TRACKER™

USER GUIDE (6)

SUPPORT

Last revision 12.3.15

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This symbol indicates a feature which is available with the 'Social Value' Upgrade

6.1. Introduction

The ‘Support’ section of Tracker gives you multiple tools to record, evaluate and report on your programmes of personal support or community regeneration:

TRACK AND EVALUATE SUPPORT PROGRAMMES

The Support Module allows you to have all your records in one place so you can easily compare and contrast different programmes and see how the team is doing as a whole.

It enables you to track and evaluate the individual intervention journey for each client: their status, engagement history, feedback, outcomes and personal impact, together with any relevant background and documentation.

It also allows you to track and evaluate the total inputs, outputs, impact and social return of an overall programme, including the sum of the individual client impacts.

CLIENT RECORDS

Track changes in client status from (say) ‘Referred’ through ‘Receiving support’ to ‘Closed – support completed’. Record all engagements by date, hours, support worker(s) and code: e.g. ‘Meeting with case worker’, ‘Training’, ‘Work experience’, etc.

Set up your own star charts to track the impact of interventions over the course of the programme: personal confidence, wellbeing, job skills, etc. Tracker will automatically calculate the movement for each criterion from ‘first’ to ‘last’ star chart as a measure of the personal impact of their involvement and collate the scores and movements for all the clients of a programme.

You can also set up your own questionnaires to collect and collate qualitative and quantitative feedback from clients, linked to each programme.

PROGRAMME RECORDS

Create a separate file for each ‘Programme’ or ‘Project’ and link it to a ‘Theme’ such as ‘Digital inclusion’, ‘Work and skills’, Financial inclusion’, etc. with a defined start and end date and programme leader.

Within each programme file, build up your records of client engagements, client expenses, other costs, staff time and contributions from partner organisations. View the collated data from client impact records (star charts) and feedback (questionnaires). Measure additional outcomes with your own bespoke set of key indicators and translate these into social values if required.

DOCUMENTS

Documents in any format can be added to either the client or the programme files, such as specific case notes, evaluation reports or event photos, to help keep records all in one place.

DASHBOARD

Once you get a feel for which functions and statistics are really useful in this module for you personally, you can choose up to eight Support widgets to have on your home screen to give you instant links and key indicators. These will be unique to you, saved and updated ready for you next time you log in.

6.2. Glossary

THEMES

These are broad categories covering the range of support or community programmes with which you may be involved: ‘Digital inclusion’, ‘Financial inclusion’, Work and skills’, etc.

You can define your own list of themes and use these for filtering or searching through your list of programmes or for consolidating reporting and analysis of programmes with a similar theme.

PROGRAMMES

Each programme represents a ‘file’ which you create to hold records relating to a specific programme of support. This will be defined by a link to one of the themes, a date range (usually a year), a name (to describe it) and a programme leader.

You may also set up programme profiling fields to record more detail about the programme, such as key objectives, sources of funding, partners you are collaborating with, etc.

CLIENTS

These are the people linked to a programme: one person may be linked to multiple programmes. You can track their full intervention journey through a programme from start to finish: how they were initially referred; changes in their client status; a diary of their engagement history; changes in their wellbeing, skills and circumstances; and the end outcomes.

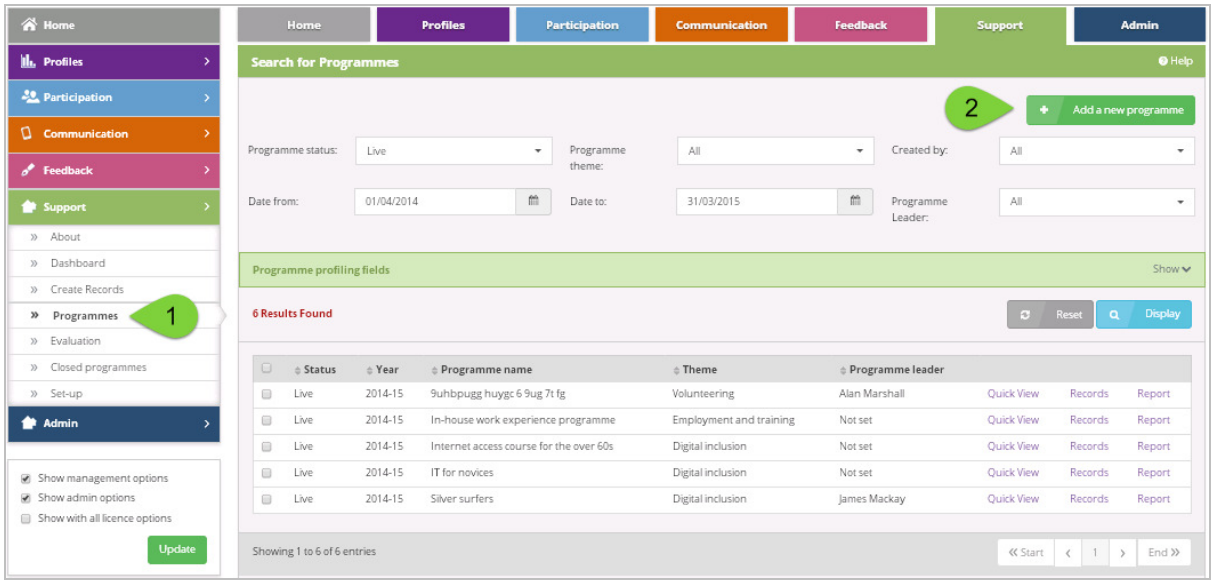
Tracker automatically links client and programme records together to avoid the need for double-entry recording.

ENGAGEMENTS

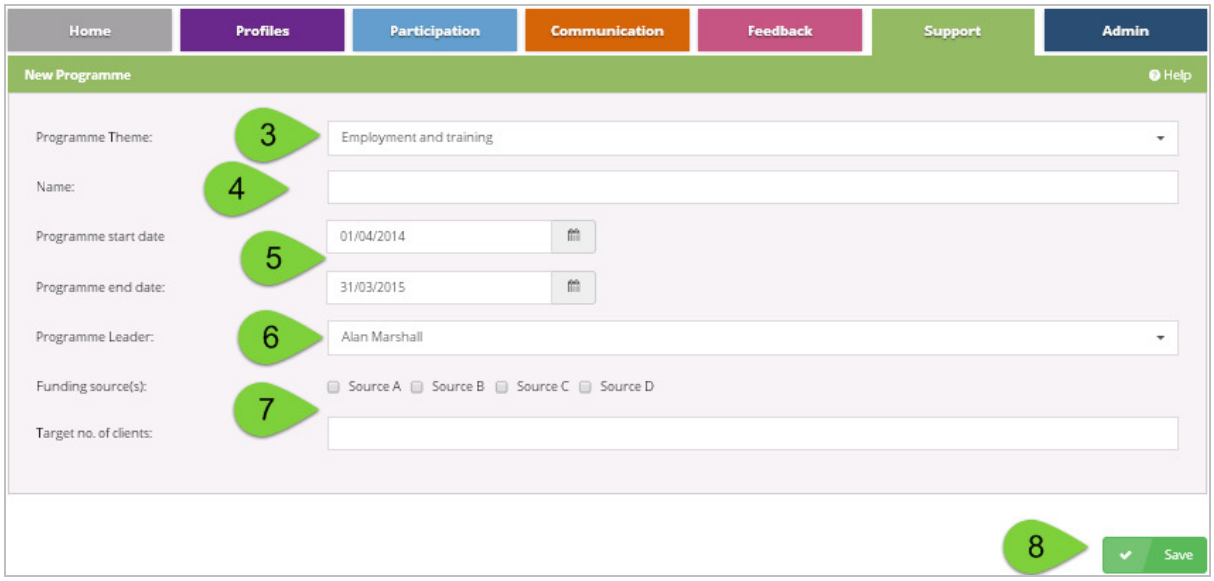
Individual records of each interaction between a client and a programme: a client; a programme; a date; an engagement code (e.g. ‘Meeting with support worker’, ‘Volunteering’, ‘Training’, ‘Work experience’, etc); hours and the staff involved.

6.3. Create a new 'Programme' file

(See 6.2 Glossary for the definition of a 'Programme')



Go to 'Support>Programmes' (1) and click the 'Add a new programme' button (2):



Select a theme (3) from the dropdown list available and give the programme a name (4).

Tracker will show default start and end dates (5) as the start and end of the current financial year, but you can edit these if you wish.

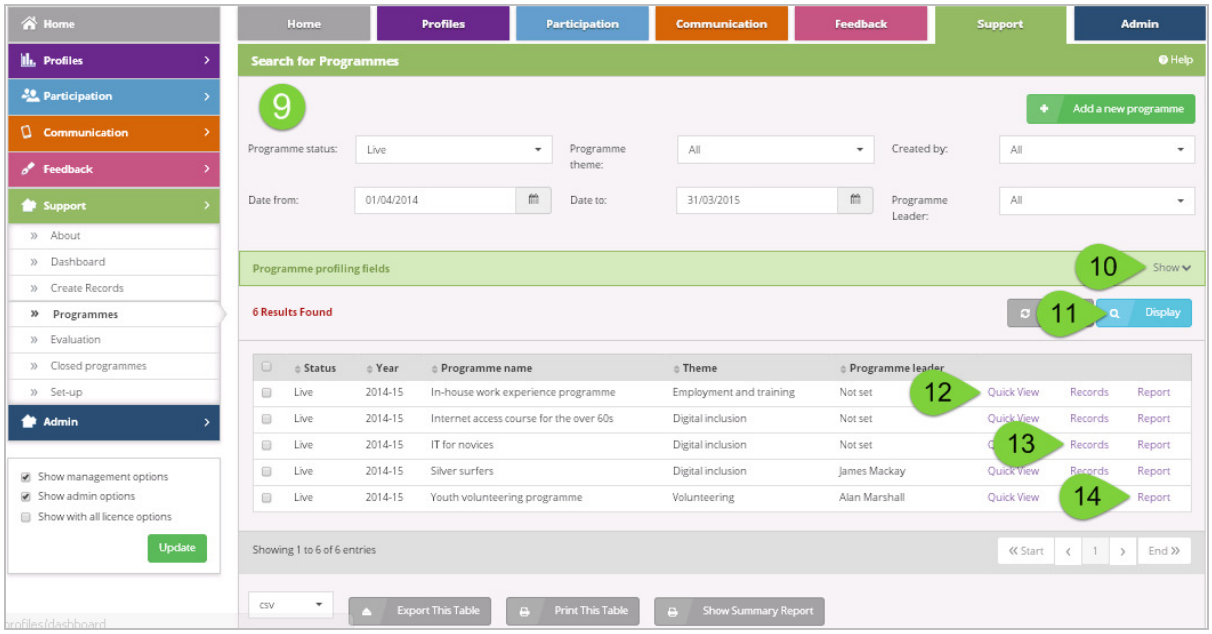
Select a programme leader (6) from the dropdown list.

If you have set up additional programme profiling fields, these will show here (7) and can be used to record background information about the programme.

Click the ‘Save’ button (8) to create your new programme.

6.4. List of all your programmes

To see a list of all your current (i.e. not yet evaluated and closed) programmes, go to 'Support>Programmes':



At the top of your screen is a set of filters (9) for you to select the range of programmes you want listed: this will default to all 'Current' programmes created during the last 12 months but you can amend these filters to show more or fewer programmes as required. Note that you can include 'Closed' programmes by selecting a different 'Programme status' option.

If you have set up some programme profiling fields, you could use these to filter your list by opening this section (10).

If you make any changes to any of the filters above, click the 'Display' button (11) to refresh the list below.

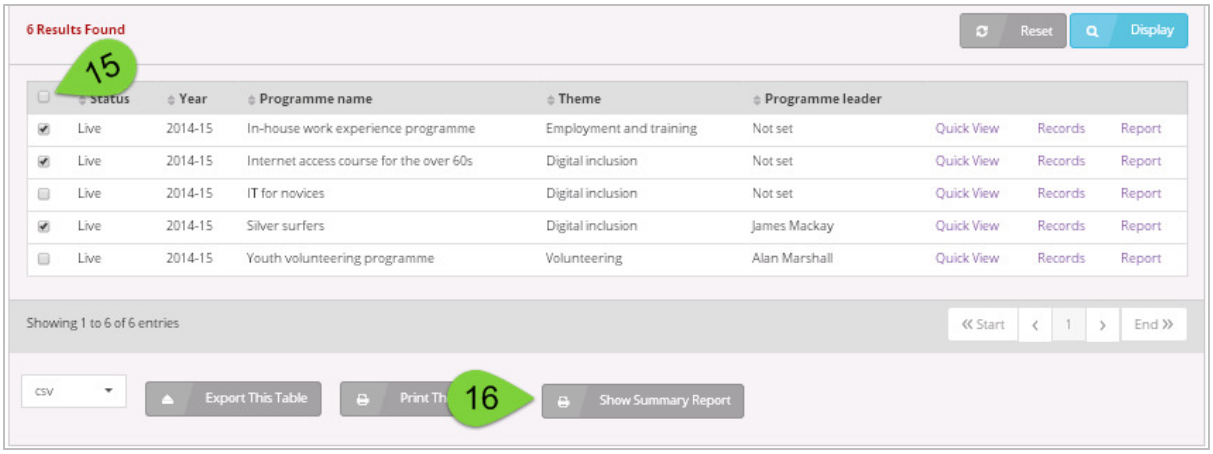
AN INDIVIDUAL PROGRAMME

Once you have selected the programme you wish to look at, you can click: 'Quick View' (12) for a popup showing summary details and indicators; 'Records' (13) to access the whole programme file and all its contents; or 'Report (14) for an onscreen summary report of the programme.

CONSOLIDATED REPORTING FROM A NUMBER OF PROGRAMMES

You may wish to view a report covering consolidated data from a number of different programmes, such as 'All programmes linked to a particular theme' or 'All programmes managed by a specific leader' or 'All programmes in this current financial year.

To select the range of programmes you wish to include in your report, filter the list so that they are all included (there can also be others showing).

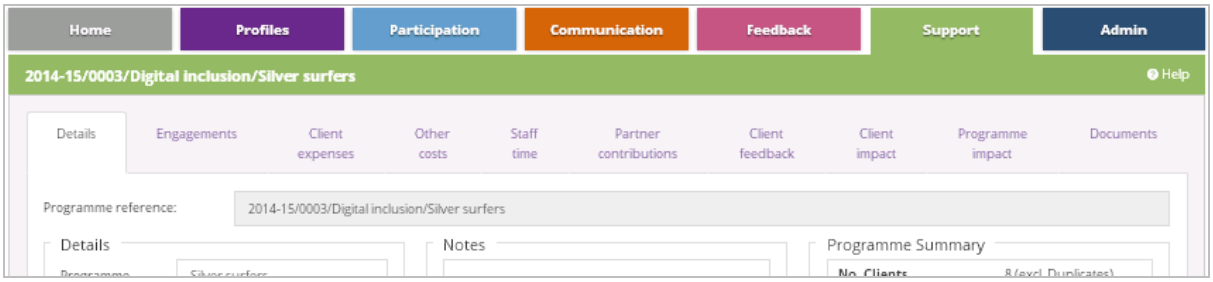

6 Results Found
Reset
Display
15
Status
Year
Programme name
Theme
Programme leader
Live 2014-15 In-house work experience programme Employment and training Not set Quick View Records Report
Live 2014-15 Internet access course for the over 60s Digital inclusion Not set Quick View Records Report
Live 2014-15 IT for novices Digital inclusion Not set Quick View Records Report
Live 2014-15 Silver surfers Digital inclusion James Mackay Quick View Records Report
Live 2014-15 Youth volunteering programme Volunteering Alan Marshall Quick View Records Report
Showing 1 to 6 of 6 entries
« Start
1
End »
csv
Export This Table
16
Show Summary Report

Use the tick boxes at the left hand end of each row in the list (15) to identify the programmes you want to include in your report. If you tick the box in the header to this column, it will tick/untick all the boxes.

Click the 'Show summary report' button (16) to view your report onscreen (see section 6.6 Programme reports). **[This feature is not yet live]**

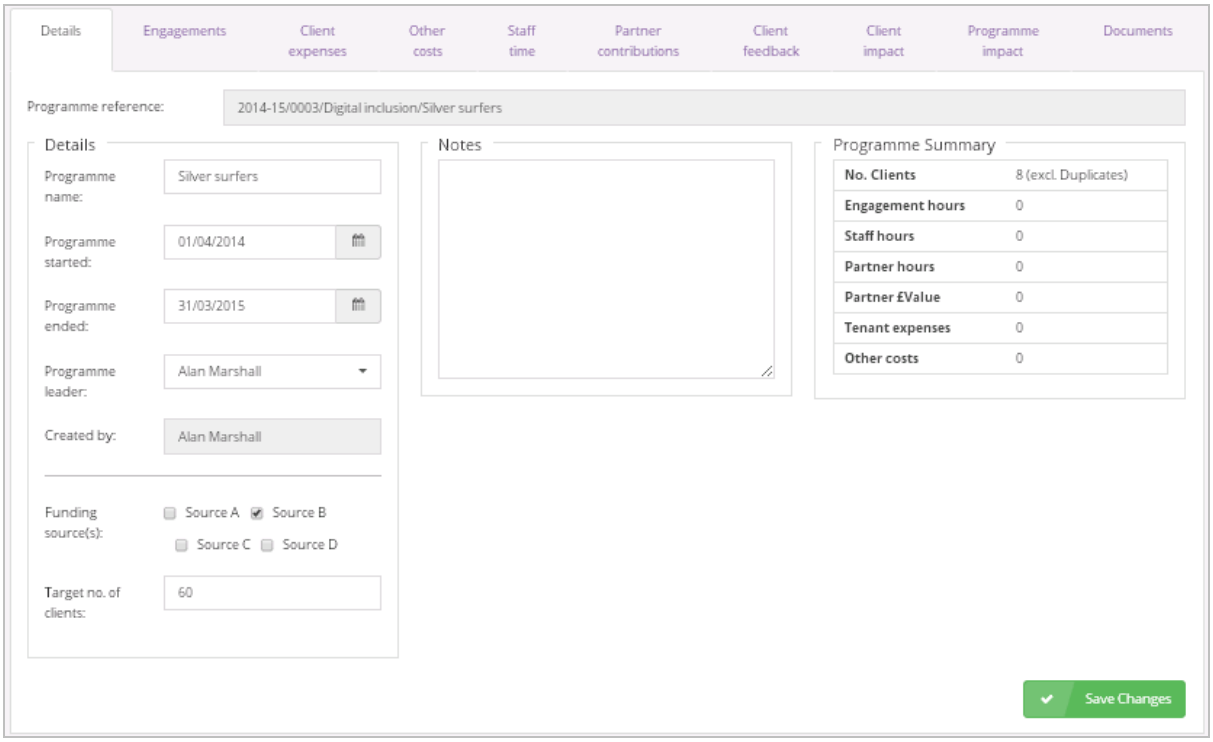
6.5. Programme records

Go to ‘Support>Programmes’, find the programme you want to view and click ‘Records’ to open up the programme file:



There are different tabs covering the range of records available; in each tab you will be able to create records, view the records already created and view a summary report of the data held there relating to this programme.

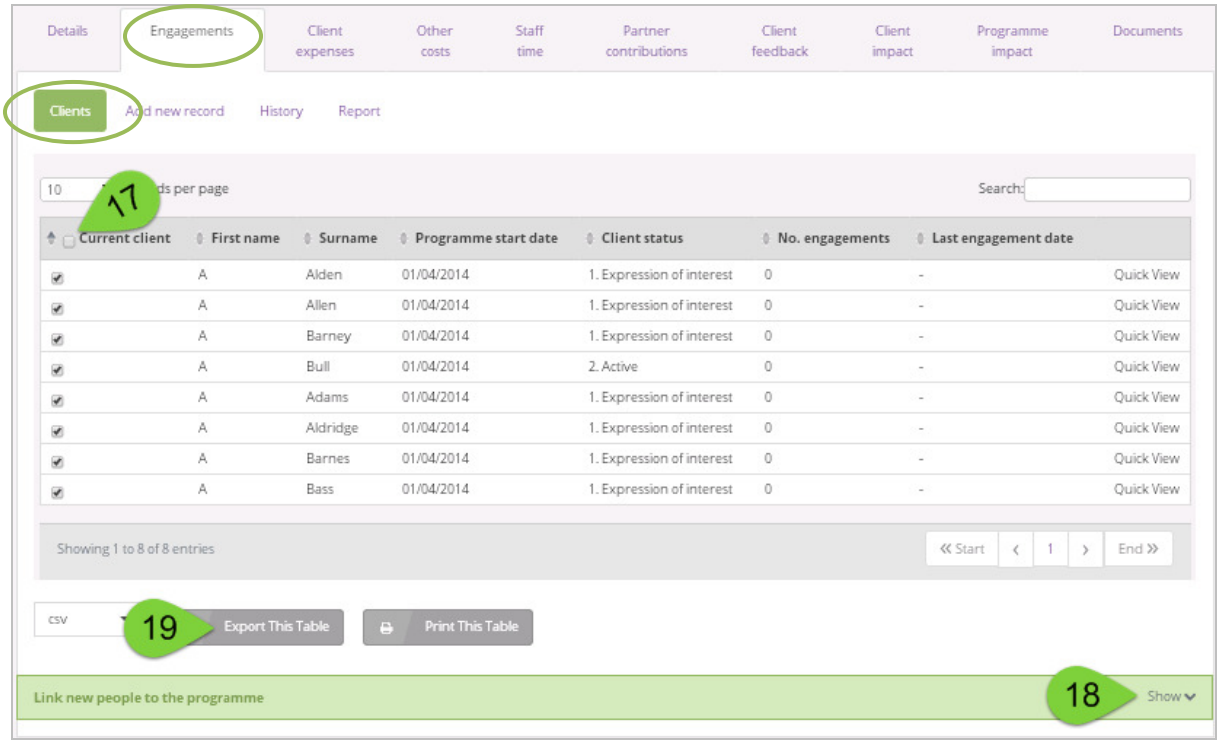
DETAILS



This tab displays the basic details which were setup when the programme was created; you can edit these and save the changes if you wish.

The screen also shows the ‘Programme summary’ which is the data included in the ‘Quick View’ popup (see p.7).

ENGAGEMENTS - CLIENTS



The clients list shows all the people who are linked to this programme.

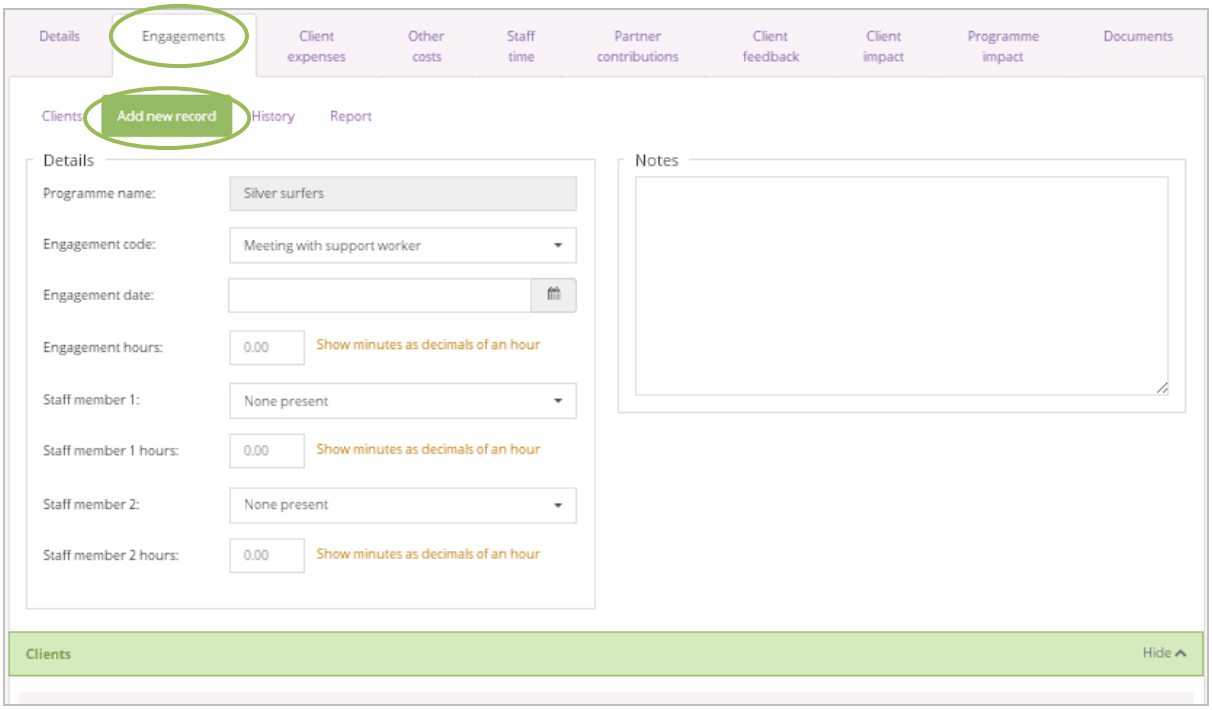
To add a new client, open the 'Link new people to the programme' section (18); search for them and tick the box at the left hand end of their row to add them to the client list.

The 'Client status' field in the list shows where clients are on their intervention journey: at one end, this list may include people who have been referred to you but do not yet have any engagement records, while at the other end there may be people who have completed the programme and are no longer engaged in any way. All these people will remain linked to the programme at all times so that you can report on past as well as current clients and activities.

However, to make it easier for you when searching or creating records, you can define a client as 'Current' meaning they are currently actively engaged. Do this by ticking the box at the left hand end of their row in the table above. On subsequent screens, the default setting will then be to show only 'current' clients.

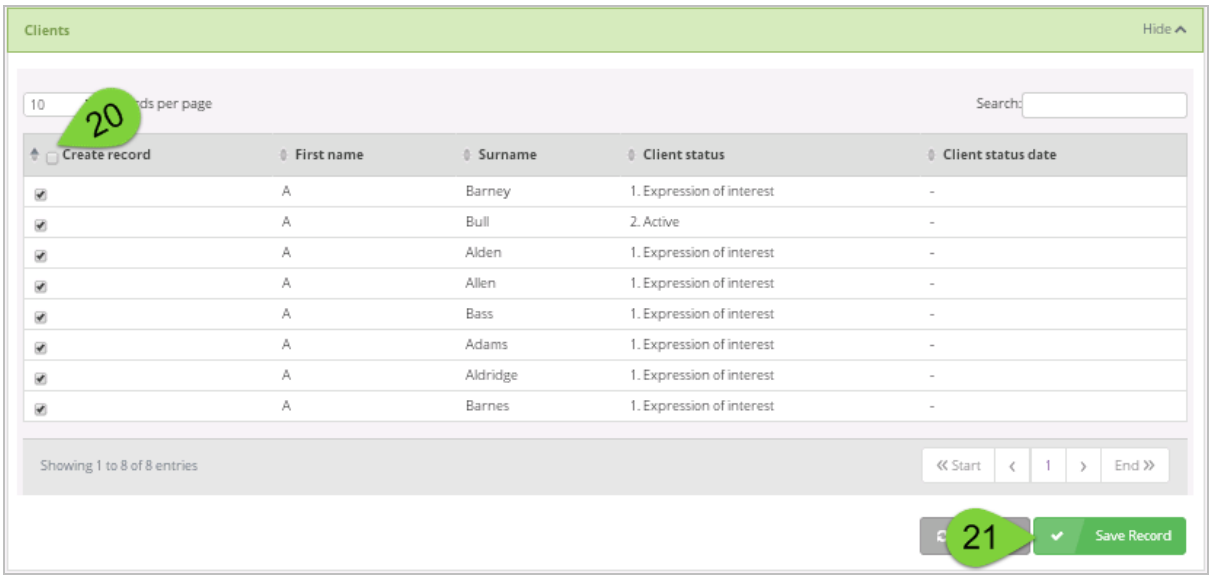
To export a list of all the clients, together with their basic contact and profiling information, click the 'Export this table' button (19).

ENGAGEMENTS – ADD NEW RECORD



You can create an engagement record for one client or for multiple clients using this form. Select an appropriate 'Engagement code' from the dropdown list, enter the date of the engagement and the length of the engagement in hours.

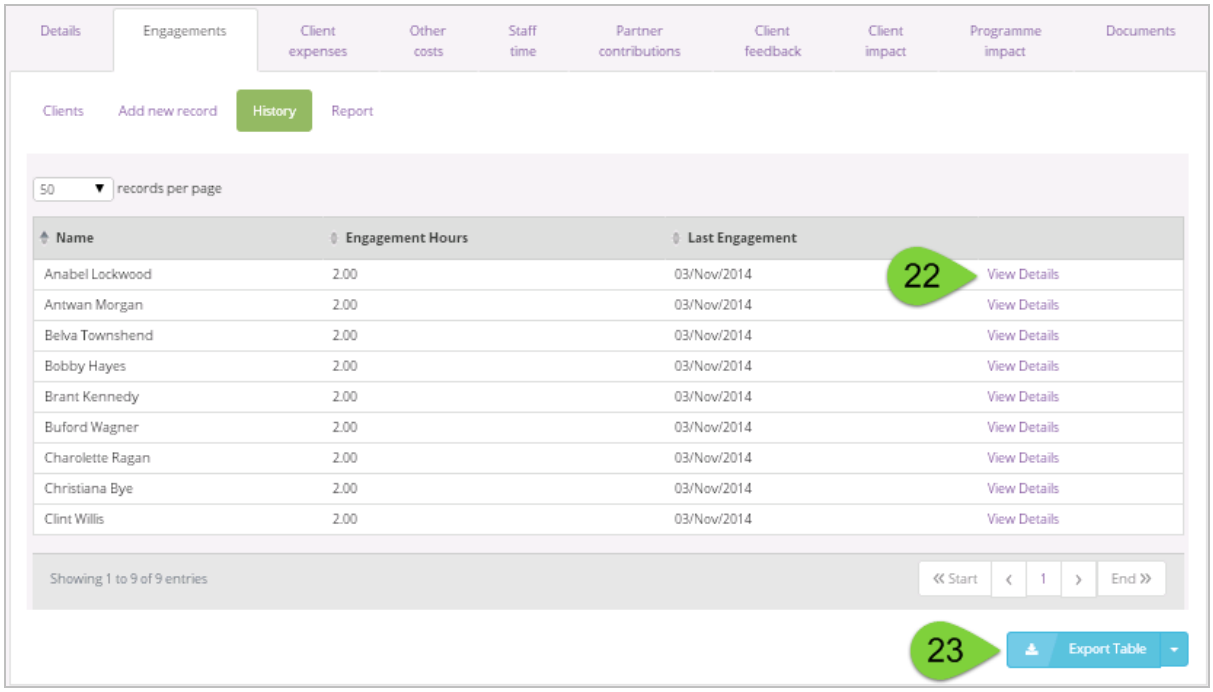
If one or two staff members were present, select their names and the hours that each of them was involved (do not have to be the same for both or same as the 'Engagement hours'). Use the 'Notes' field to record any further details you require.



Open up the current ‘Clients’ list and tick (20) those clients who you wish to link to this engagement record. You can use the tick box in the column header to tick/untick all the records if you wish.

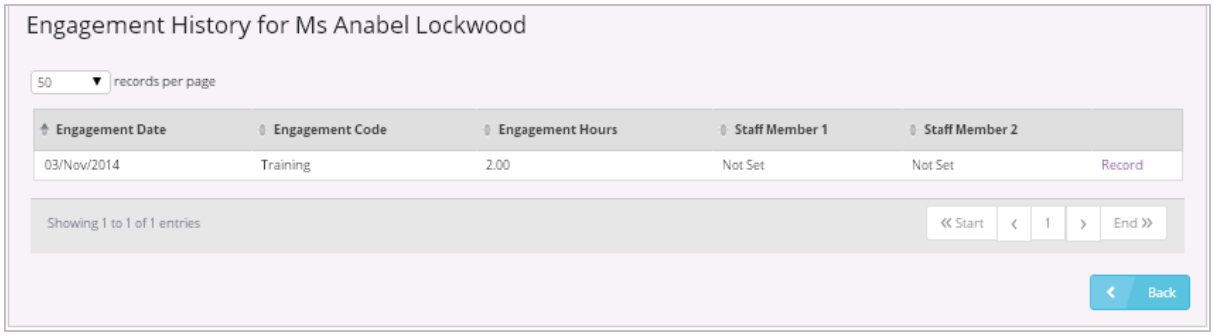
Save the record by clicking the ‘save record’ button (21). This will add the record(s) to the ‘Programme’ file and also to each ‘Client’ file.

ENGAGEMENTS – HISTORY



The ‘History’ screen lists the clients for whom there are one or more engagement records. The table shows their total engagement hours (may have been more than one engagement record) and the date of the last of their engagement records.

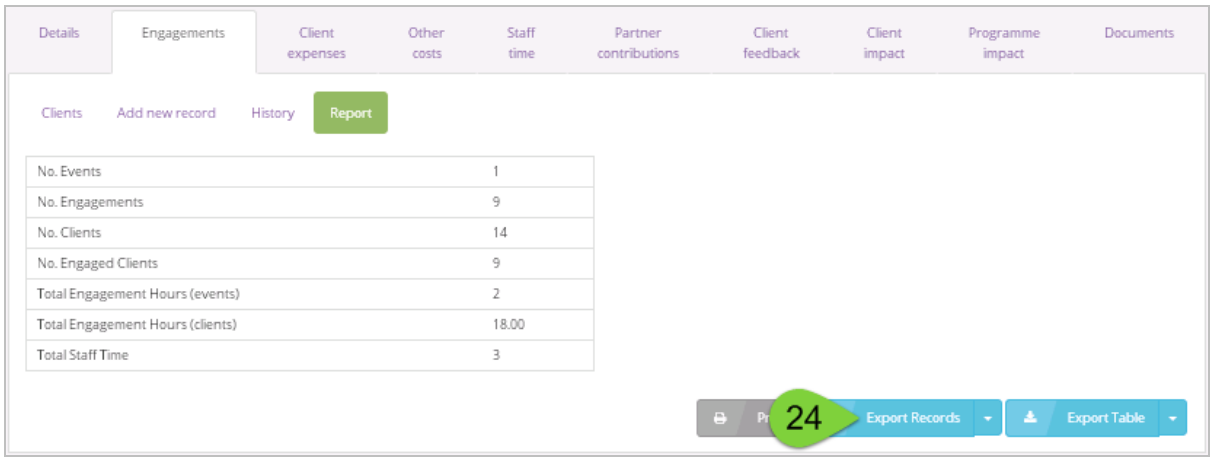
If you click ‘View details’ (22) you will see a table listing all their engagements with access to view/edit each of them:



Click the ‘Export table’ button (23) to see a spreadsheet listing all the engagements for all the clients [You will need to click the little dropdown arrow at the right hand end of the button to select whether you want this is Excel.csv, Excel.xls or Excel.xlsx format]:

	A	B	C	D	E	F	G	H	I	J
1	**Personal Reference**	**First Name**	**Surname**	**Engagement Date**	**Engagement Code**	**Client Hours**	**Staff 1**	**Staff 1 Hours**	**Staff 2**	**Staff 2 Hours**
2	TEN3787	Anabel	Lockwood	03/Nov/2014	Training	2	None	3	None	0
3	TEN2123	Antwan	Morgan	03/Nov/2014	Training	2	None	3	None	0
4	TEN3491	Belva	Townshend	03/Nov/2014	Training	2	None	3	None	0
5	TEN2233	Bobby	Hayes	03/Nov/2014	Training	2	None	3	None	0
6	TEN2259	Brant	Kennedy	03/Nov/2014	Training	2	None	3	None	0
7	TEN2303	Buford	Wagner	03/Nov/2014	Training	2	None	3	None	0
8	TEN4162	Charolette	Ragan	03/Nov/2014	Training	2	None	3	None	0
9	TEN4034	Christiana	Bye	03/Nov/2014	Training	2	None	3	None	0
10	TEN2431	Clint	Willis	03/Nov/2014	Training	2	None	3	None	0

ENGAGEMENTS – REPORT

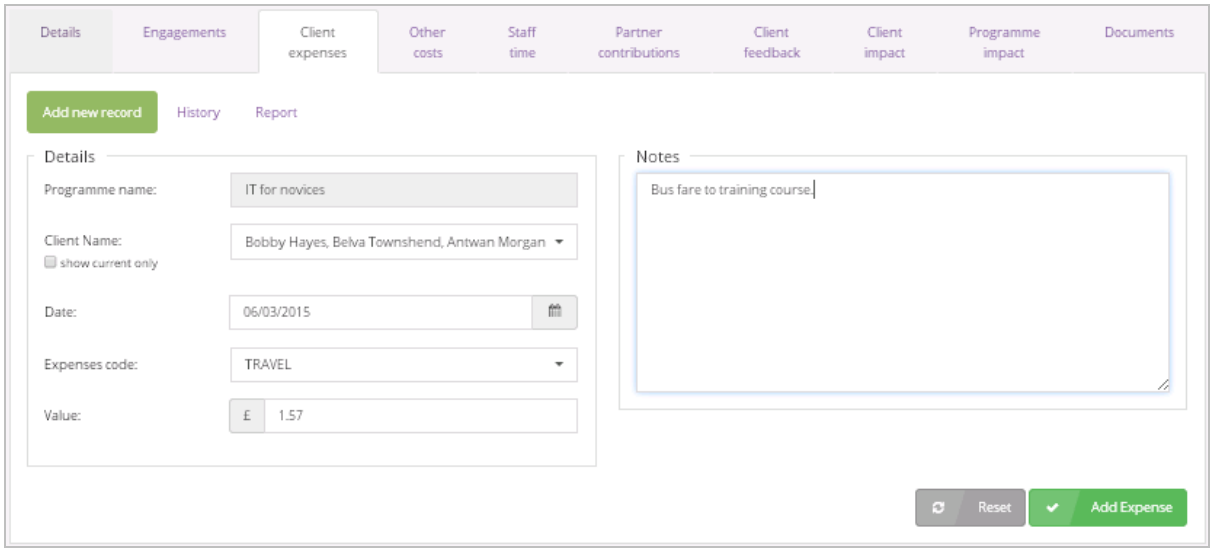


This gives you an onscreen summary of all the engagement records.

The ‘Export records’ button (24) gives you another opportunity to download a spreadsheet listing all the engagements for all the clients.

The adjacent ‘Export table’ button allows you to export the table shown on screen into Excel.

CLIENT EXPENSES



Client expense records are l**inked to specific clients** by ticking one or more names in the 'Client name' dropdown list. If this is a large list, you may want to filter it down to only show 'current' clients by ticking the 'Show current only' box.

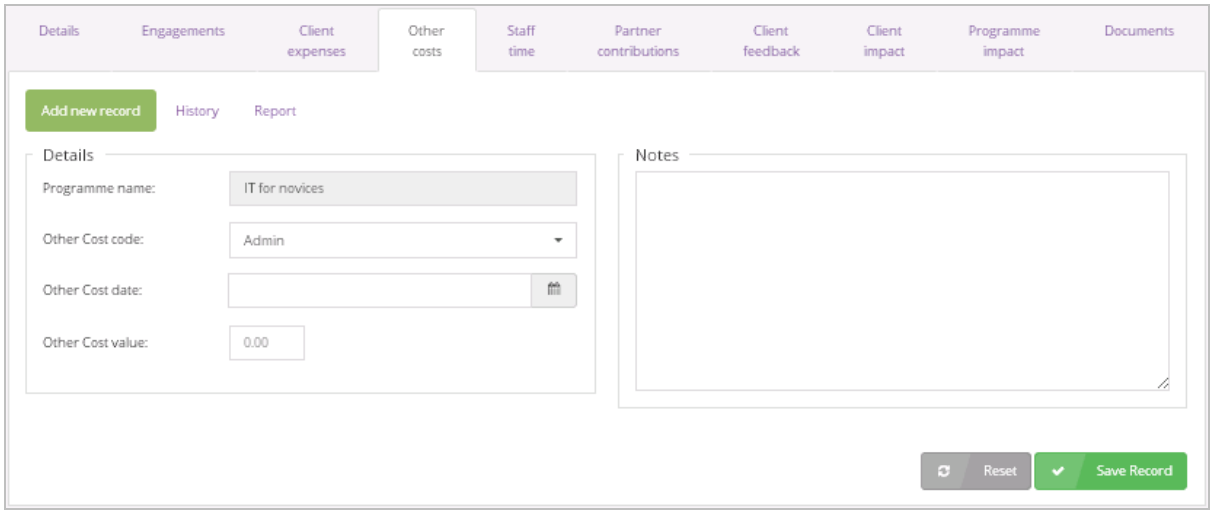
Enter a date, select an expense code, enter a value and any 'Notes', then click the 'Add expense' button to save the record(s).

Remember that you have a 'Documents' tab here should you wish to upload copies of receipts or any other supporting documentation.

Note that if you create a record for multiple records, the 'Value' you enter will be applied equally to each record. So if the values are different for different people you will have to enter the records separately.

The 'History' tab shows all the records created to date and the 'Report' tab gives you an onscreen summary of the data recorded. Both tabs give you a facility to export a list of all the records into Excel.

OTHER COSTS

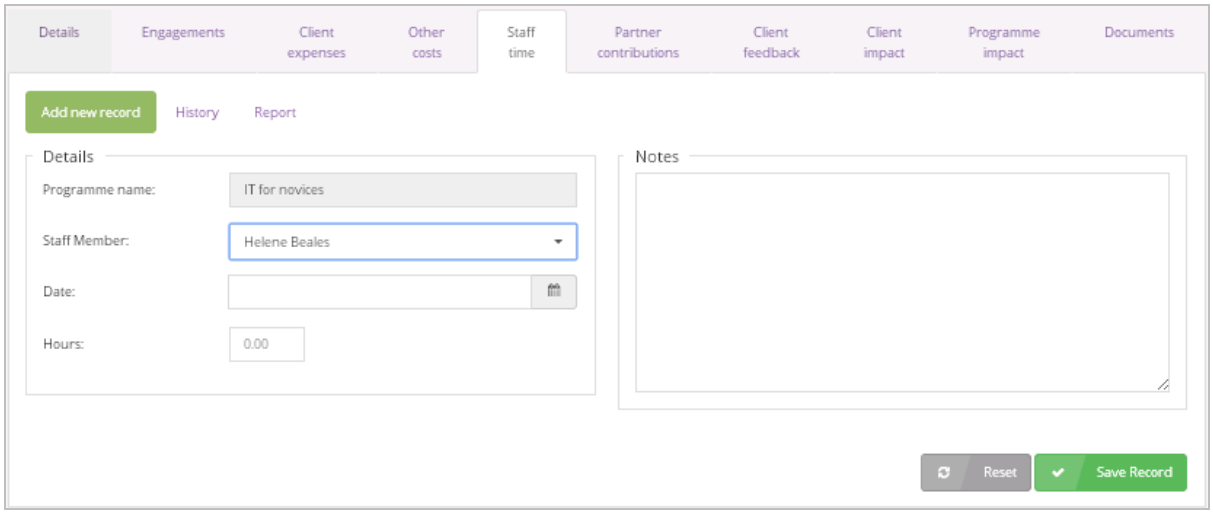


Costs recorded here are those that **relate to the overall programme** rather than to expenses claimed by a specific client, such as venue hire, provision of transport, tutor fees, etc.

Select a code, enter the date and the value; add any 'Notes' required and click the 'save record' button.

The 'History' tab shows all the records created to date and the 'Report' tab gives you an onscreen summary of the data recorded. Both tabs give you a facility to export a list of all the records into Excel.

STAFF TIME

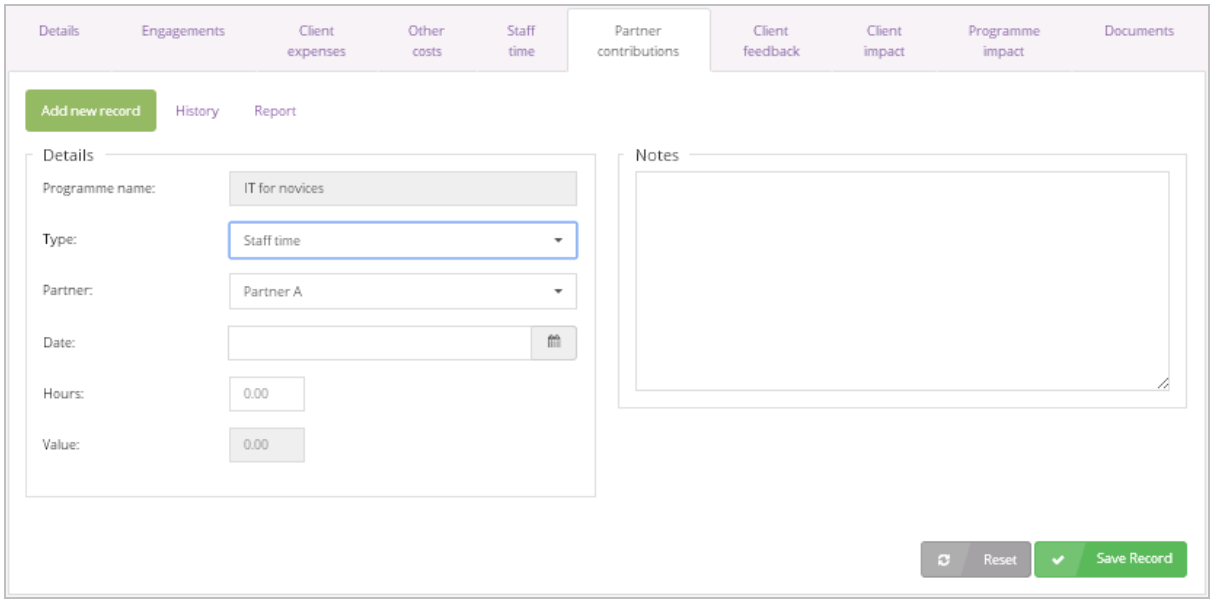


This is for recording any staff time not recorded as part of an 'Engagement record'.

Select the staff member, date and hours; add any notes required and click the ‘Save record’ button.

The ‘History’ tab shows all the records created to date and the ‘Report’ tab gives you an onscreen summary of the data recorded. Both tabs give you a facility to export a list of all the records into Excel.

PARTNER CONTRIBUTIONS



This is for recording inputs to the programme provided by a partner organisation.

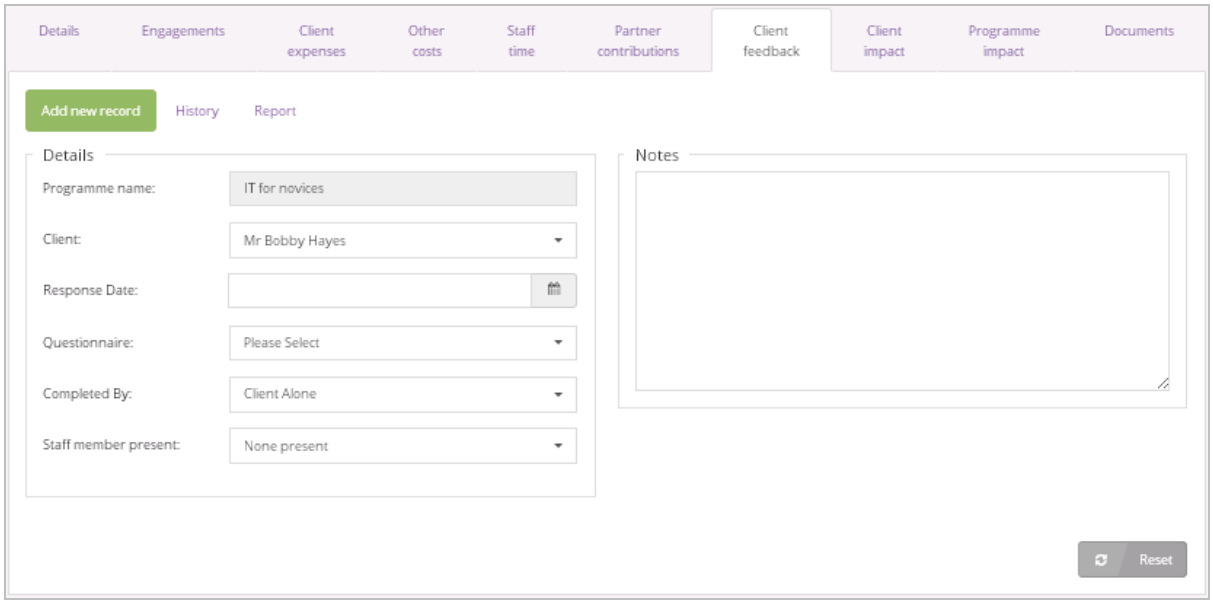
Select a contribution ‘Type’:

- If you select ‘Staff time’ the ‘Value’ box will be greyed out so you can enter the person-hours contributed in the ‘Hours’ box and Tracker will calculate the value of those hours and enter it in the ‘Value’ box automatically;
- If you select any other code, you can enter the ‘Value’ directly.

Enter a date and any notes required, then click the ‘Save record’ button.

The ‘History’ tab shows all the records created to date and the ‘Report’ tab gives you an onscreen summary of the data recorded. Both tabs give you a facility to export a list of all the records into Excel.

CLIENT FEEDBACK

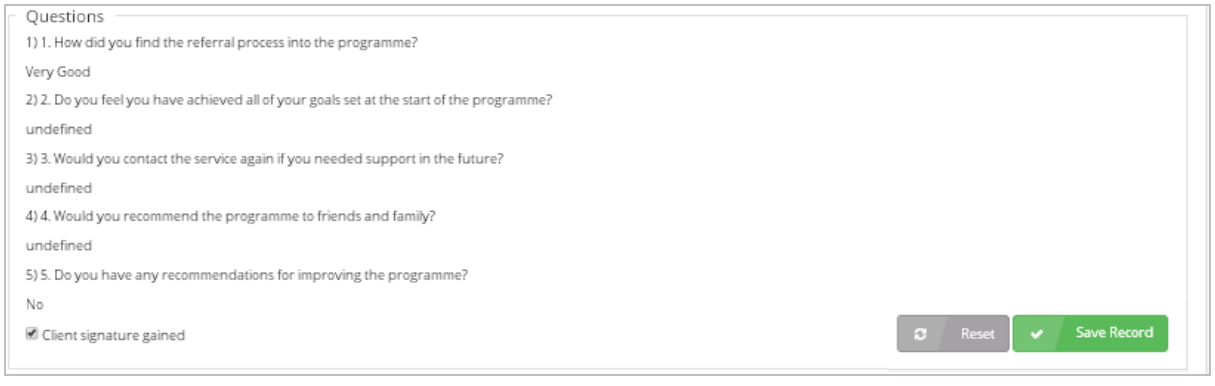


You can enter the feedback from an individual client (not multiple clients as they are unlikely to be all identical) using one of the questionnaires you have set up. Note that you can also do this through their personal file.

Select a client, response date and questionnaire; record how/with whom they completed the questionnaire and add any notes.

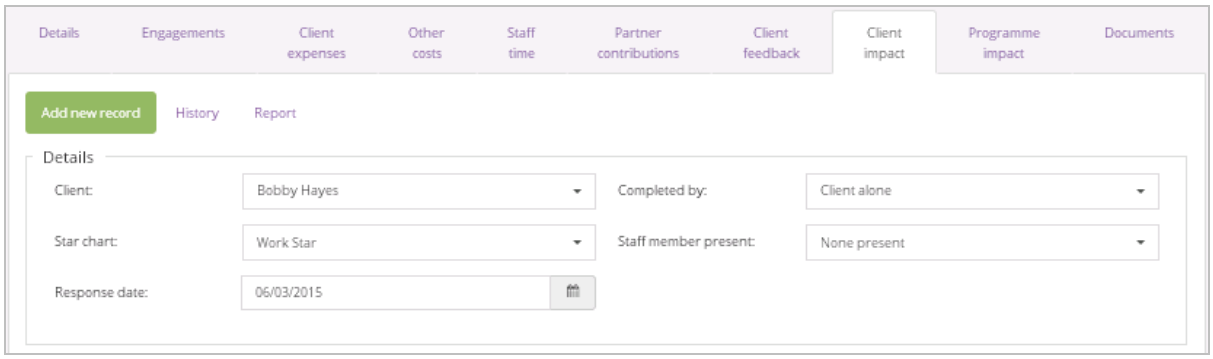
When you have selected the questionnaire, the questions will appear in sequence at the foot of the screen and you can enter their answers to each question:

At the end, you will see a summary of all their responses for you to check before clicking 'Save record':


Questions
1) 1. How did you find the referral process into the programme?
Very Good
2) 2. Do you feel you have achieved all of your goals set at the start of the programme?
undefined
3) 3. Would you contact the service again if you needed support in the future?
undefined
4) 4. Would you recommend the programme to friends and family?
undefined
5) 5. Do you have any recommendations for improving the programme?
No
Client signature gained
Reset
Save Record

The ‘History’ tab shows all the records created to date and the ‘Report’ tab gives you an onscreen summary of the data recorded. Both tabs give you a facility to export a list of all the records into Excel.

CLIENT IMPACT



You can record the ‘Star chart’ scores for an individual client (not multiple clients as they are unlikely to be all identical) using one of the star charts you have set up. Note that you can also do this through their personal file.

Select a client, response date and star chart; record how/with whom they completed the chart and add any notes.

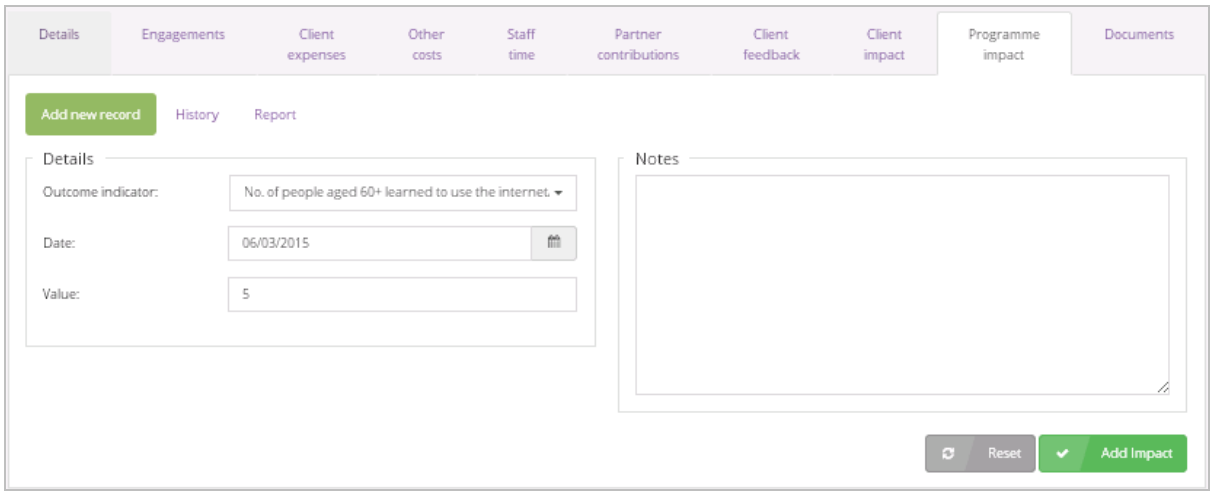
When you have selected the chart, the criteria will appear at the foot of the screen; click on each criterion in turn and enter their scores on a scale from 0 to 10:

[You may like to develop your own guide notes to try and ensure a consistent approach to scoring: this could be placed in the ‘Documents’ section of the programme file or on the overall site ‘Pinboard’ where it can be accessed by all staff.]

Click the ‘Add impact’ button to save the record.

The ‘History’ tab shows all the records created to date and the ‘Report’ tab gives you an onscreen summary of the data recorded. Both tabs give you a facility to export a list of all the records into Excel.

PROGRAMME IMPACT



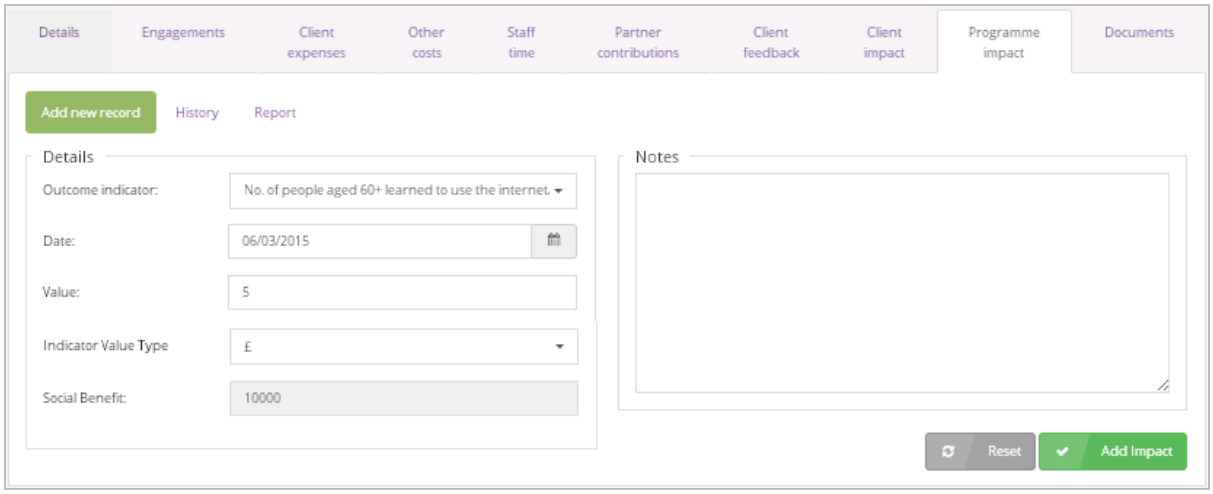
Tracker will automatically generate information about programme outcomes from:

- Engagement records: The numbers of clients supported overall, the number obtaining specific forms of support (work experience, volunteering opportunities, training, etc) and the number successfully completing the programme;
- Client impact records: The average percentage improvement in each Star Chart criteria (e.g. self confidence, work skills, financial awareness, etc) for all clients.

In addition, you can use your own set of indicators here to record other outcomes.

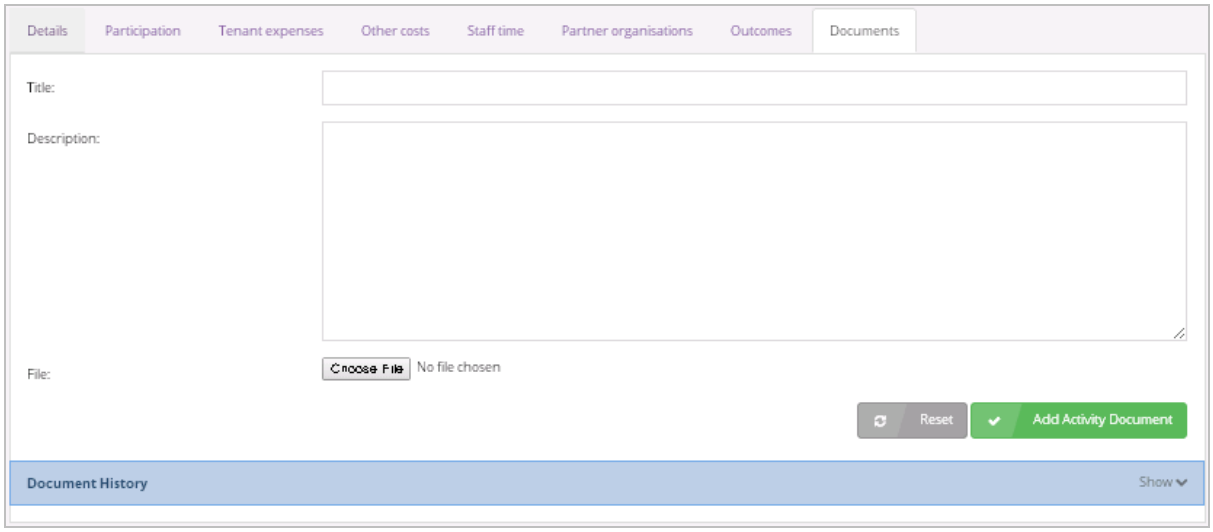
Select an indicator, enter a date and a value; add any notes required then click the ‘record impact’ button to save the record.

With the Social value upgrade, if you have linked the indicator to a social value proxy, Tracker will translate your output into a social benefit value:



[This feature is not yet live]

DOCUMENTS



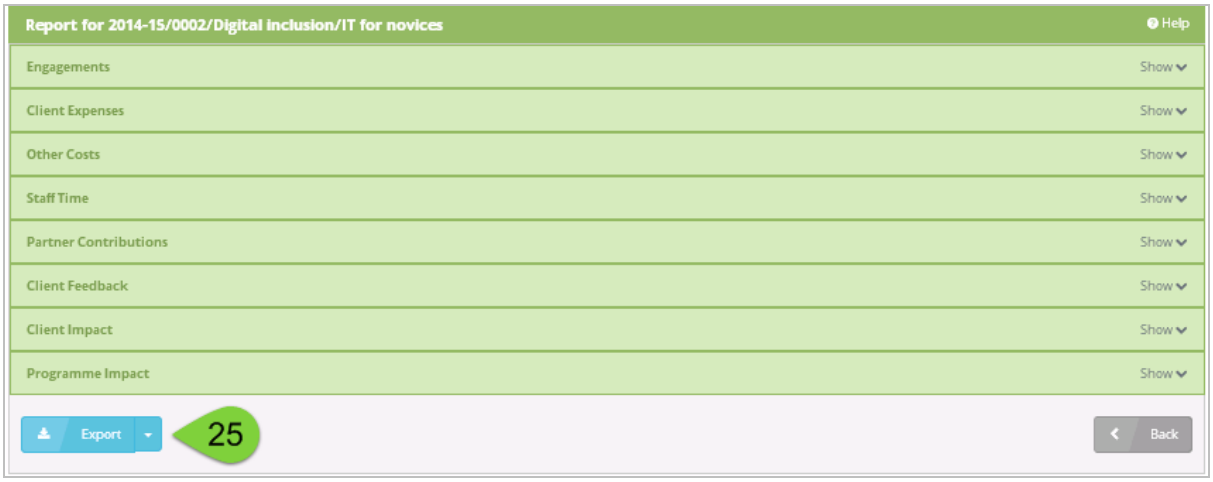
Use this tab to store documents relating to the overall programme (use the equivalent tab in a client file to store documents relating to a specific client). You can browse and upload documents, spreadsheets or photos in ANY format including: Word, Excel, PDF, JPEG, etc.

Just give the document a name and a brief description then browse for it and then click the 'Add activity document' button.

To view, download, replace or delete any documents, open the 'Document history' section.

6.6. Programme reports

Go to 'Support>Programmes', find the programme you want to view and click 'Report' to open up an onscreen summary report of all the data held in the programme file:



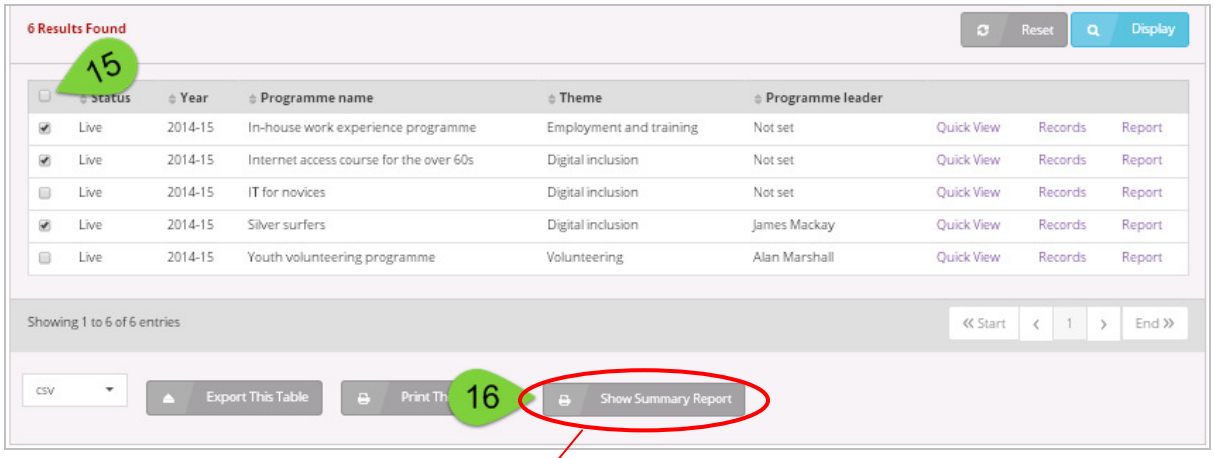
The sections of the report are identical to those available in the 'report' tabs within the programme file (see section 6.5 Programme records).

In addition you can export the whole report by clicking the blue 'Export' button (25):

	A	B
1	**Engagements**	
2		
3	No. Engagements	5
4	No. Clients	14
5	Total Engagement Hours (events)	10
6	Total Engagement Hours (clients)	140
7	Total Staff Time	8
8		
9	**Expenses**	
10		
11	No. claims	0
12	No. clients	0
13	Total cost	0
14		
15	**Other Costs**	
16		
17	No. claims	0
18	Total cost	0
19		
20	**Staff Time**	
21		
22	No. records	3
23	No. staff	2
24	Total staff hours	10
25	Total cost (£)	250

You can also see a report in the same format but covering consolidated data from a number of different programmes, such as ‘All programmes linked to a particular theme’ or ‘All programmes managed by a specific leader’ or ‘All programmes in this current financial year.

To select the range of programmes you wish to include in your report, filter the list so that they are all included (there can also be others showing).


6 Results Found
Reset
Display
15
Status
Year
Programme name
Theme
Programme leader
Live 2014-15 In-house work experience programme Employment and training Not set Quick View Records Report
Live 2014-15 Internet access course for the over 60s Digital inclusion Not set Quick View Records Report
Live 2014-15 IT for novices Digital inclusion Not set Quick View Records Report
Live 2014-15 Silver surfers Digital inclusion James Mackay Quick View Records Report
Live 2014-15 Youth volunteering programme Volunteering Alan Marshall Quick View Records Report
Showing 1 to 6 of 6 entries
« Start
1
End »
csv
Export This Table
16
Show Summary Report

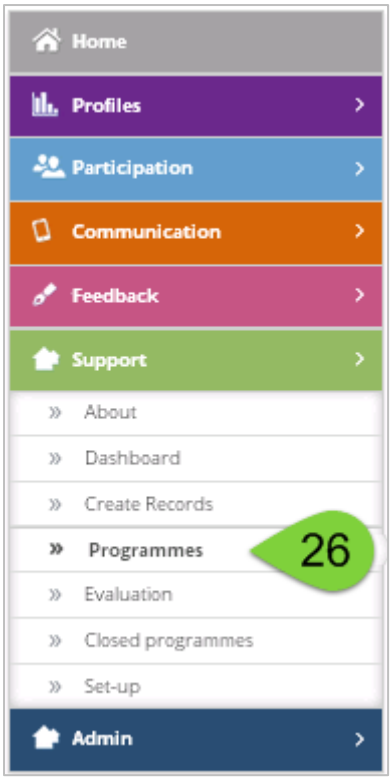
Use the tick boxes at the left hand end of each row in the list (15) to identify the programmes you want to include in your report. If you tick the box in the header to this column, it will tick/untick all the boxes.

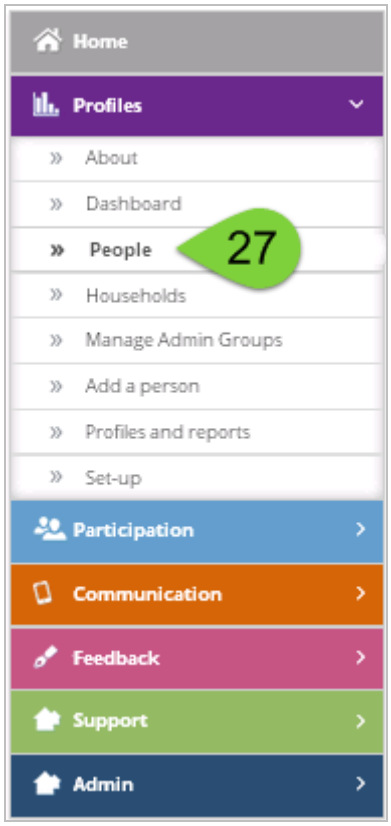
Click the ‘Show summary report’ button (16) to view your report onscreen.

[This feature is not yet live]

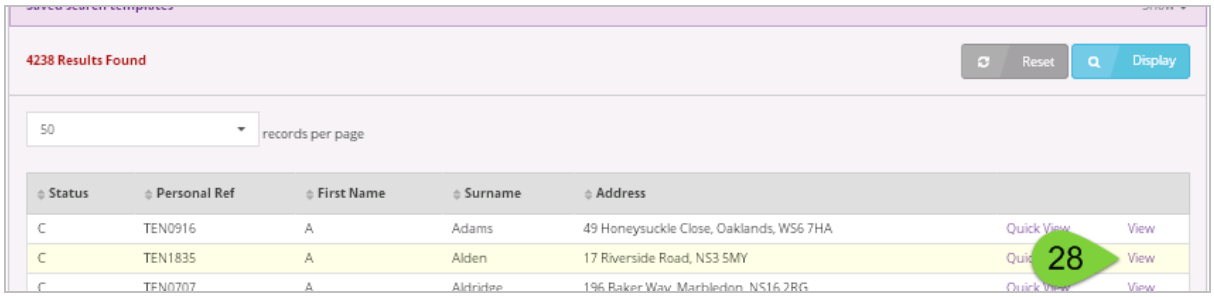
6.7. Client records

Records relating to BOTH a specific 'Programme' AND a specific 'Client' can be created and viewed through either the programme file (via 'Support>Programmes') or the client file (via 'Profiles>People').

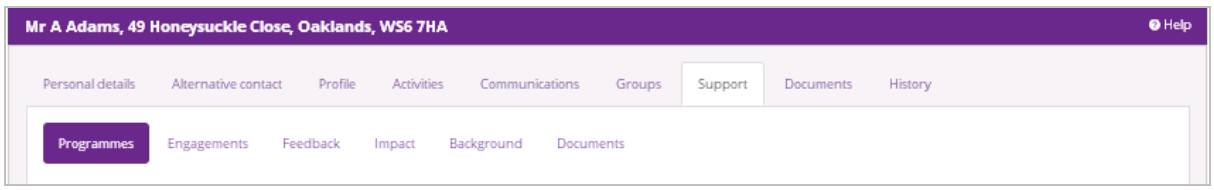




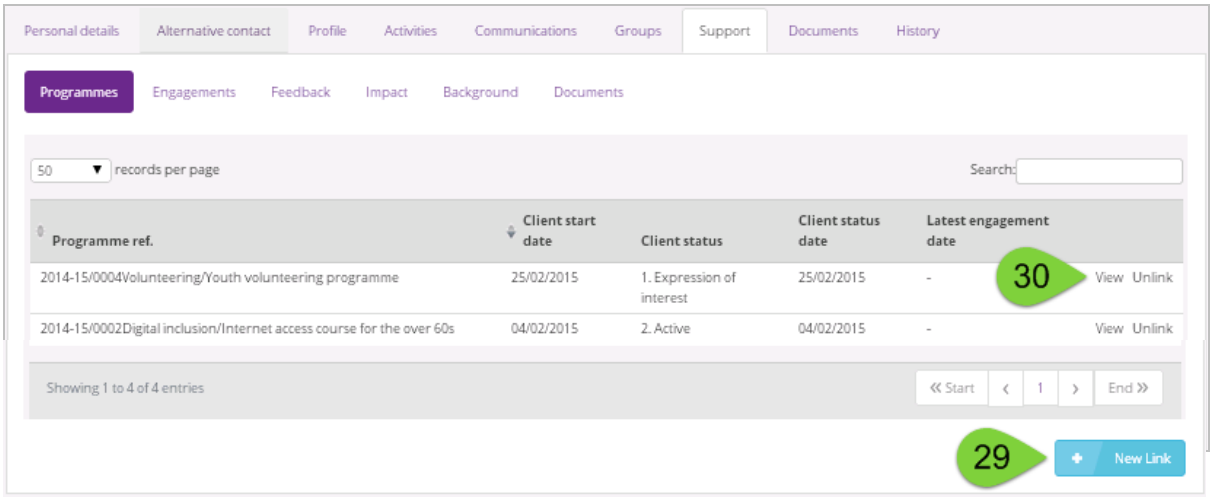
To access the client files, go to 'Profiles>People', search for the person you want and click 'View':



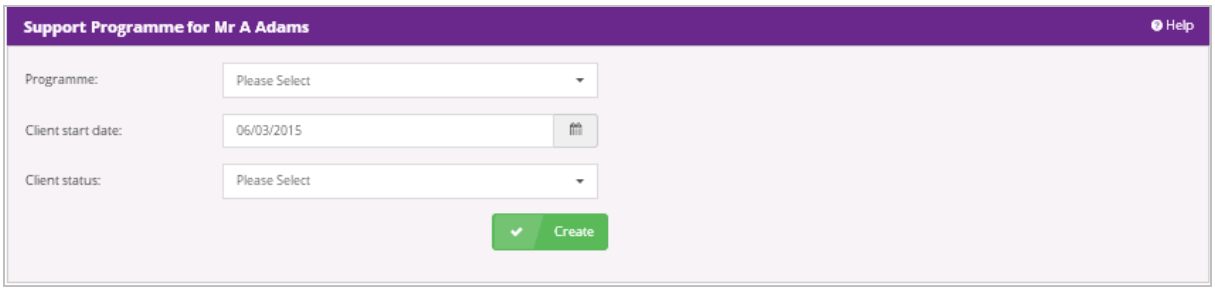
Click on the 'Support' tab to access all the functionality which is linked to programmes in the Support Module:



PROGRAMMES

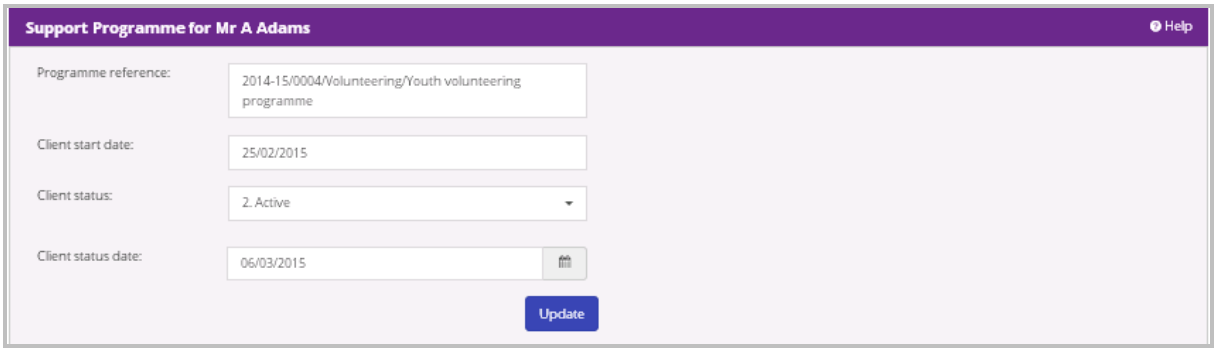


Link this person to a programme by clicking the 'New link' button (29):



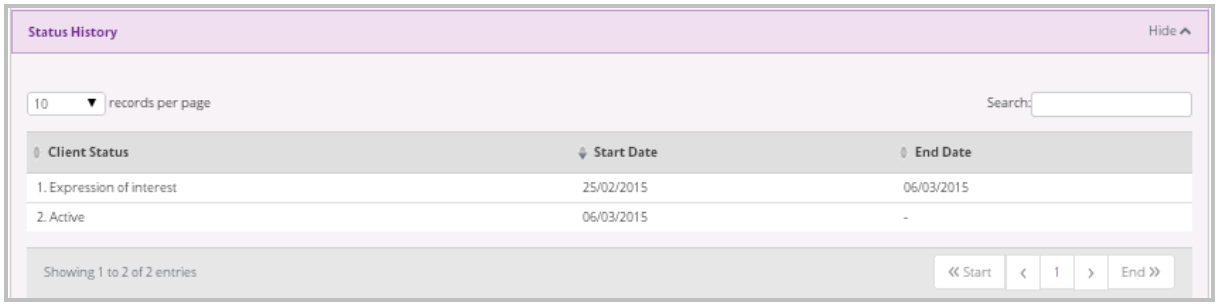
Select a programme and an initial client status; the start date will default to today but can be amended. [Note that once you have created this link, you will not be able to amend the start date]. Click the 'Create' button to establish the link.

Once the link has been established it can be undone by clicking 'Unlink' (30) but only as long as there have been no records created yet. Click 'View' (30) to see the details of the link and amend the 'Client status' if required:

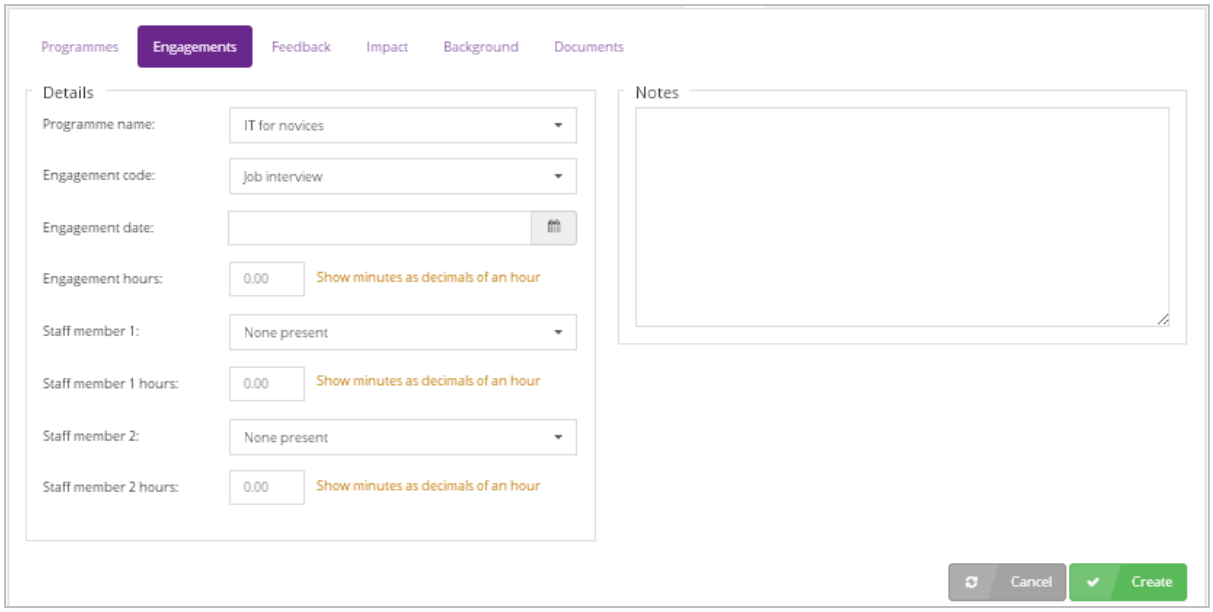


Select a new client status and the date of the change, then click the 'Update' button.

Open the ‘Status history’ section to view the full record of changes in client status:



ENGAGEMENTS



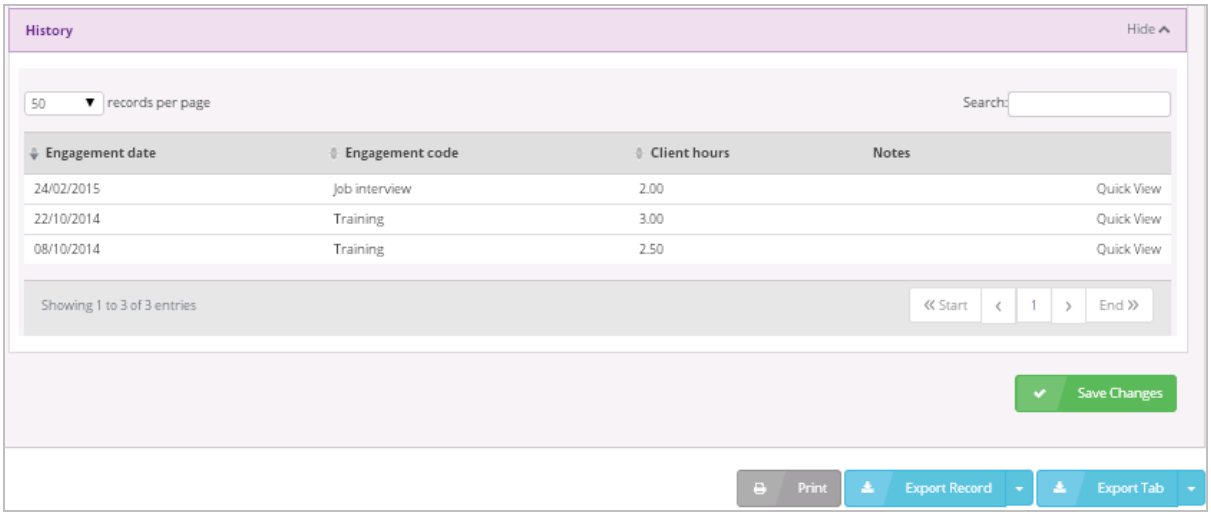
Create a record of an engagement for this client: you can simultaneously create records for multiple clients through the Programme file (see section 6.5 ‘Programme records’) but here you can only create records for this one client.

Select the programme and engagement code; enter a date and the length of the engagement in hours.

If one or two staff members were present, select their names and the hours for which each of them was involved (they can be different).

Enter any notes required and click the ‘Create’ button.

You can see all this client's engagement records by opening the 'History' section:



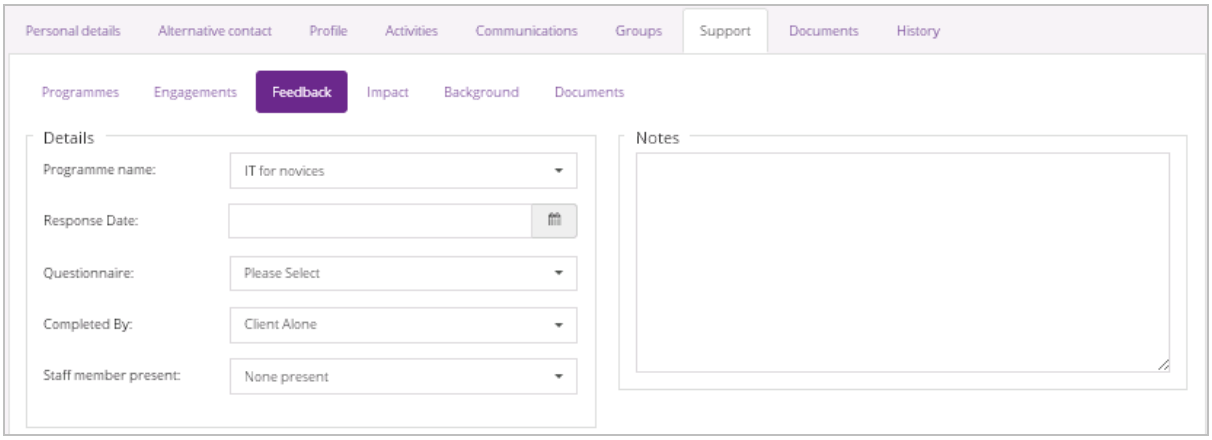
Past engagements will be listed in date order with the most recent at the top. To export the data on this sub-tab (Engagements) into Excel, click the 'Export tab' button:

	A	B	C	D	E	F	G
1	**Personal Ref.**	**First Name**	**Surname**	**Engagement date**	**Engagement code**	**Client hours**	**Notes**
2	TEN0916	A	Adams	2014-10-08	Training	2.5	
3	TEN0916	A	Adams	2014-10-22	Training	3	
4	TEN0916	A	Adams	2015-02-24	Job interview	2	
5							

To export the personal details of this client, click the 'Export record' button.

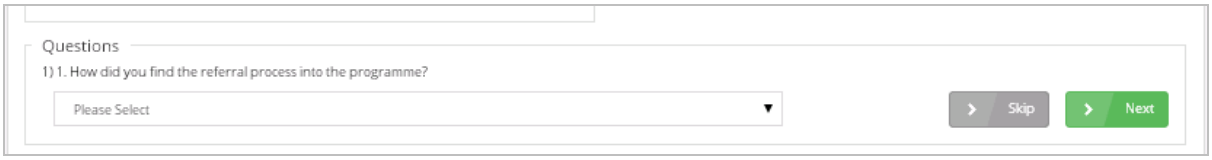
	A	B	C	D	E	F	G	H	J	K	M	Q	
1	**PersonalReference**	**Title**	**Firstname**	**Surname**	**AddressLine1**	**AddressLine2**	**PostalCode**	**Tel1**	**Email**	**DateOfBirth**	**Gender**	**Religion**	**SexualO**
2	TEN0916	Mr	A	Adams	49 Honeysuckle Close	Oaklands	WS6 7HA	01333 279301	a@yacoo.coz.ukx	1981-01-01	Male	Christian	Not kno
3													
4													

FEEDBACK

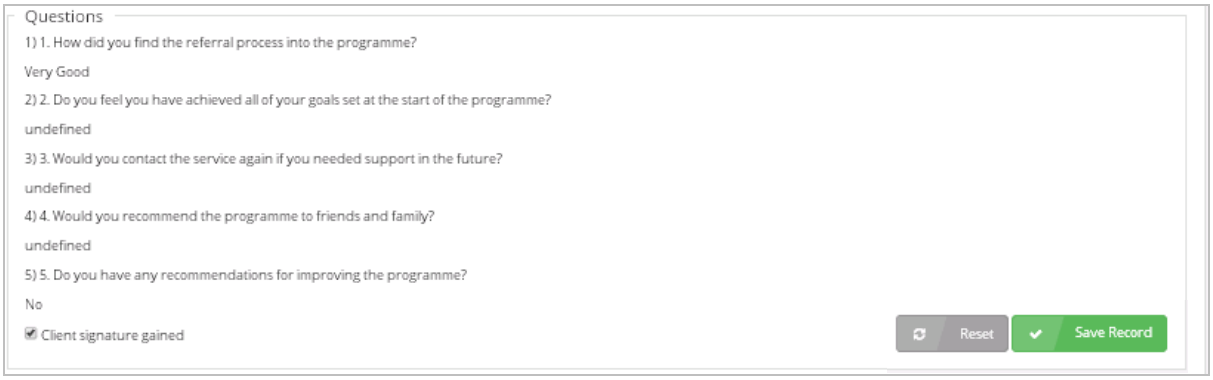


Record the client's responses to a feedback questionnaire: Select a programme and a questionnaire; enter a response data and record who actually completed the questionnaire and if a staff member was present.

When you have selected the questionnaire, the questions will appear in sequence at the foot of the screen and you can enter their answers to each question:

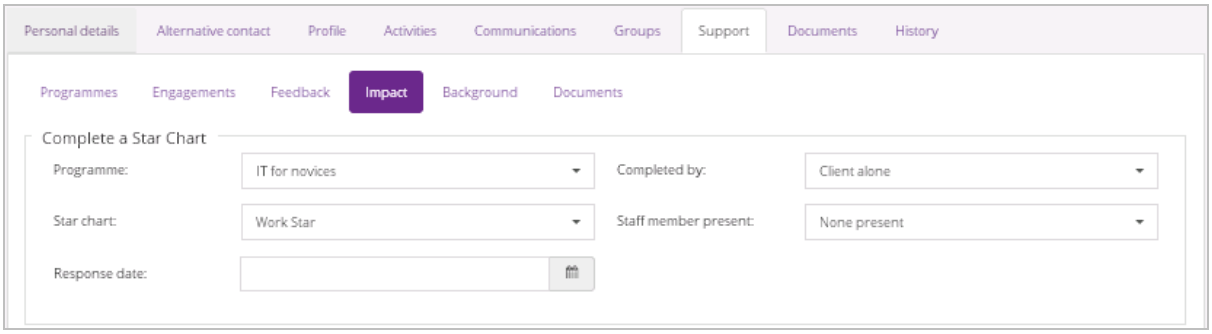


At the end, you will see a summary of all their responses for you to check before clicking 'Save record':


Questions
1) 1. How did you find the referral process into the programme?
Very Good
2) 2. Do you feel you have achieved all of your goals set at the start of the programme?
undefined
3) 3. Would you contact the service again if you needed support in the future?
undefined
4) 4. Would you recommend the programme to friends and family?
undefined
5) 5. Do you have any recommendations for improving the programme?
No
Client signature gained
Reset
Save Record

You can see all the past responses to questionnaires by opening the 'History' section.

IMPACT

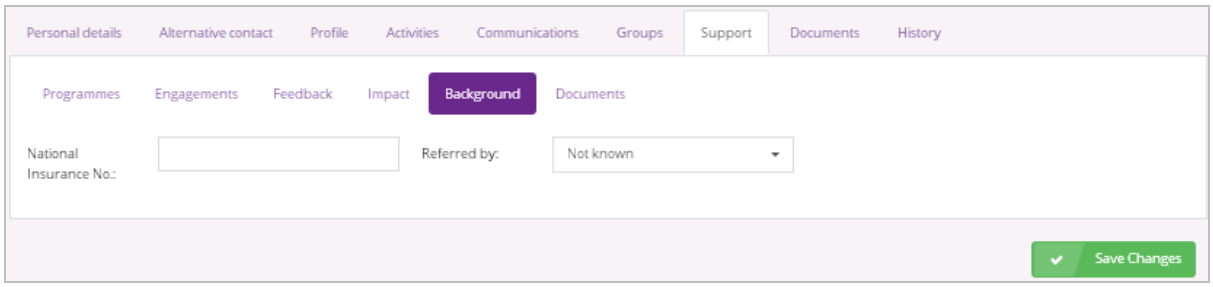


Select a programme, and star chart; enter a date and record how/with whom they completed the chart and add any notes. When you have selected the chart, the criteria will appear at the foot of the screen; click on each criterion in turn and enter their scores on a scale from 0 to 10:

Click the ‘Add impact’ button to save the record.

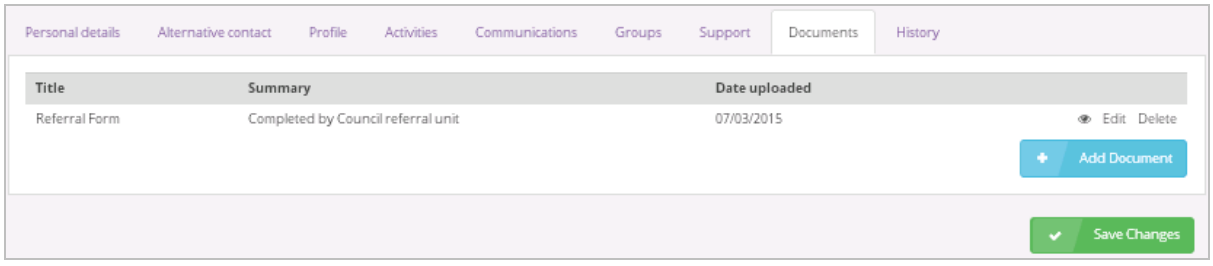
You can see all the past star chart scores by opening the ‘History’ section.

BACKGROUND



If you have set up ‘Client background’ fields they will be shown here and can be used to record additional background information about this client. Note that these fields are not specific to any individual programme.

DOCUMENTS



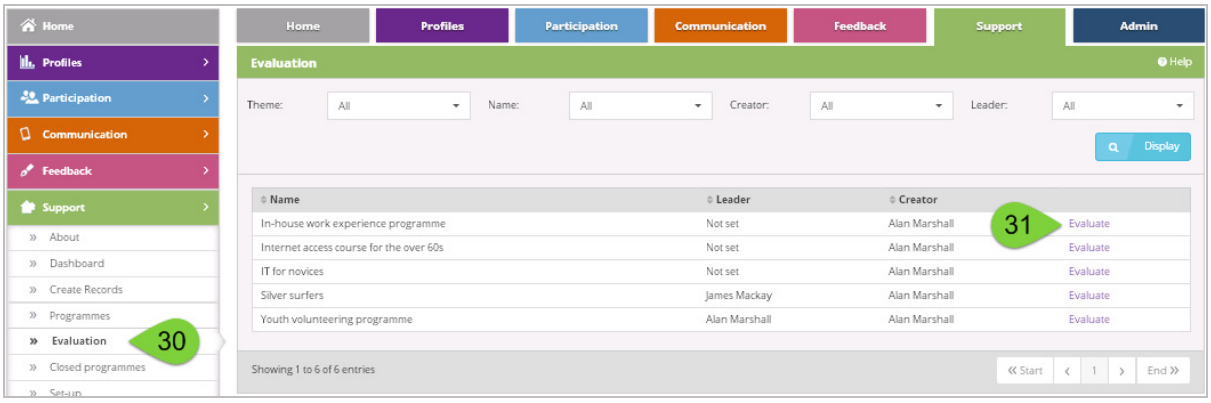
You can upload documents here relating to this client for easy access and storage. Click the ‘Add document’ button, browse for the document, give it a name and a brief description then click ‘Save’.

The documents you have uploaded will be listed in the table above: click the ‘eye’ to open and view the document; click ‘Edit’ if you want to amend the name or description, or replace the document with a revised version; click ‘Delete’ if you no longer require this documents.

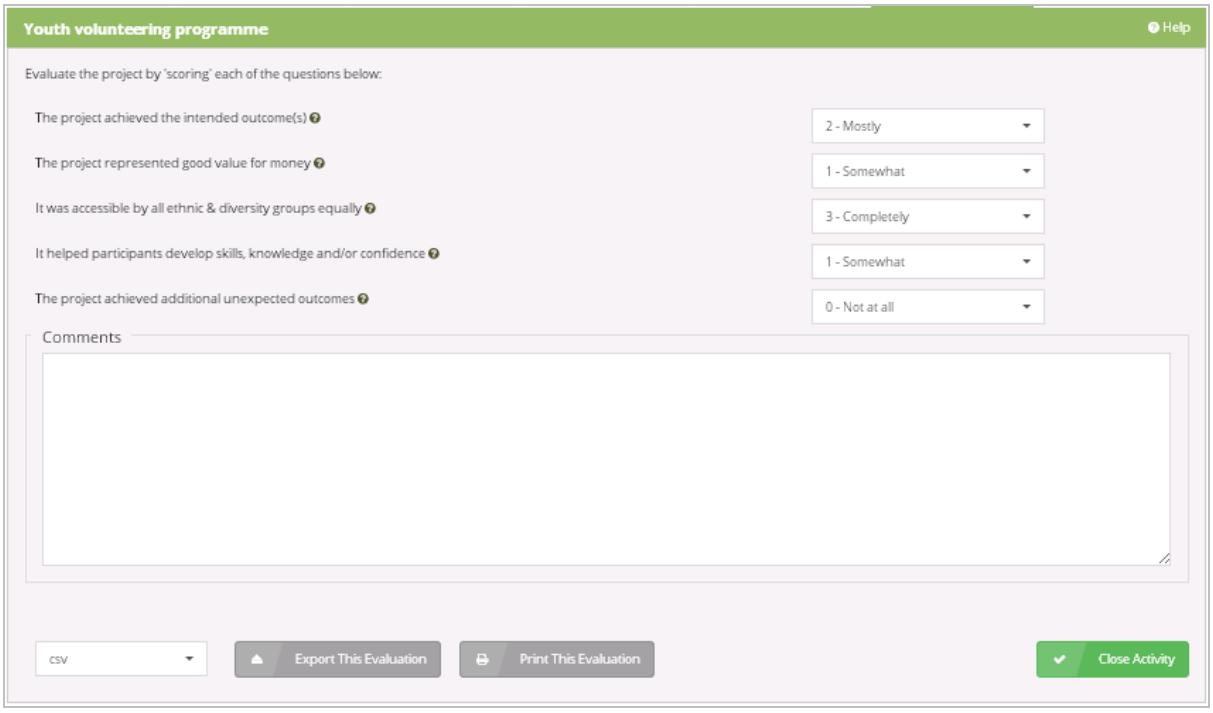
6.8. Programme evaluation and closure

'Evaluation' is the process by which you review a completed programme and change its status from 'Live' to 'Closed'. Closed programmes are then moved to the 'Closed programmes' tab but can also still be viewed on the 'Programmes' tab if you change the 'Programme status' filter from 'Live' (the default setting) to 'Closed' or 'All'.

Go to 'Support>Evaluation' (30):



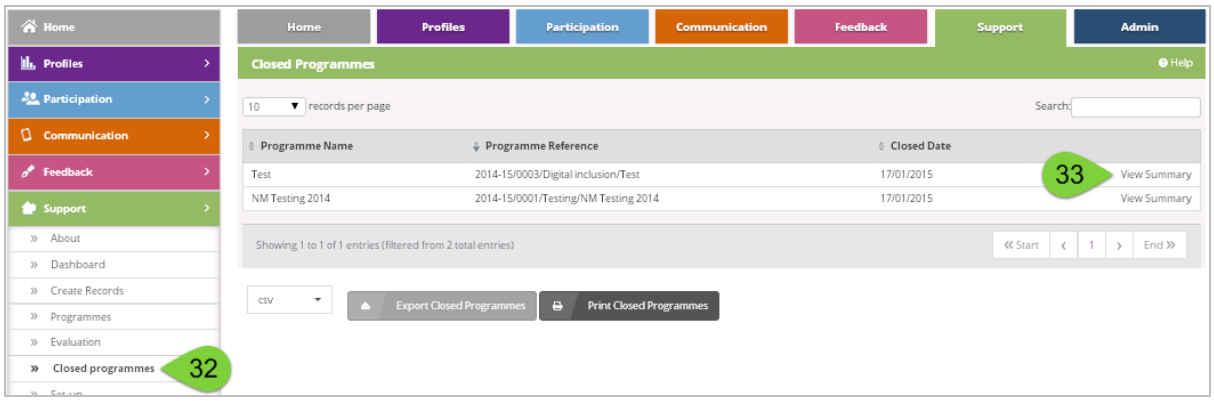
Select your programme and click 'Evaluate (31).


Youth volunteering programme
Help
Evaluate the project by 'scoring' each of the questions below:
The project achieved the intended outcome(s)
2 - Mostly
The project represented good value for money
1 - Somewhat
It was accessible by all ethnic & diversity groups equally
3 - Completely
It helped participants develop skills, knowledge and/or confidence
1 - Somewhat
The project achieved additional unexpected outcomes
0 - Not at all
Comments
csv
Export This Evaluation
Print This Evaluation
Close Activity

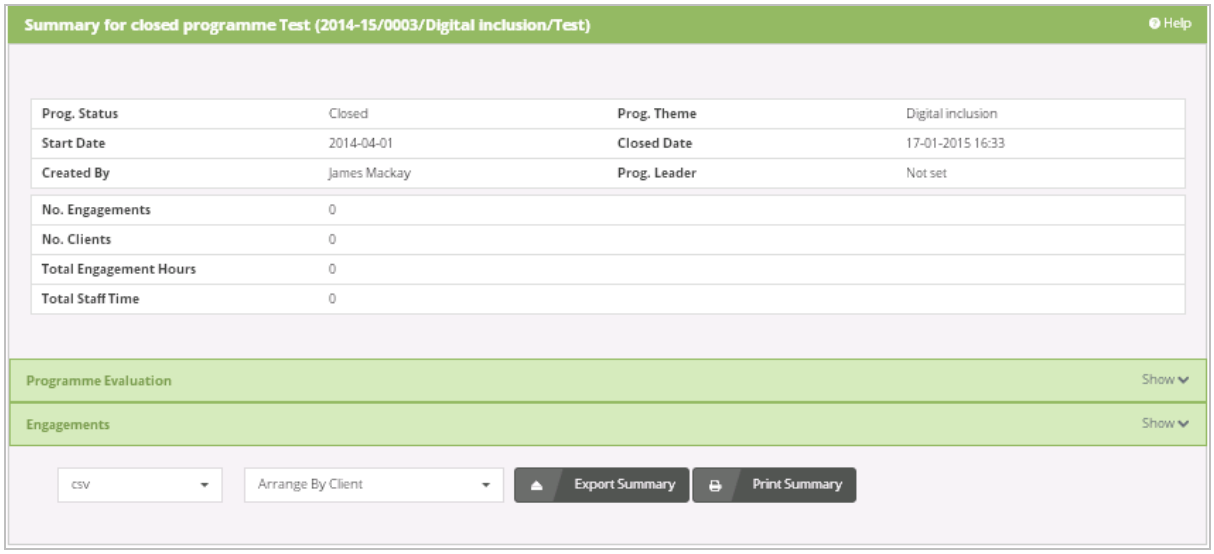
Select the most appropriate 'score' for each of the evaluation questions; guidance notes are available for each question by clicking on the ? symbol.

Add any written comments then click the ‘Close activity’ button; Tracker will record that it was you who completed the review (permission to use this function may be restricted to certain users only – refer to your site administrator if necessary).

CLOSED PROGRAMMES



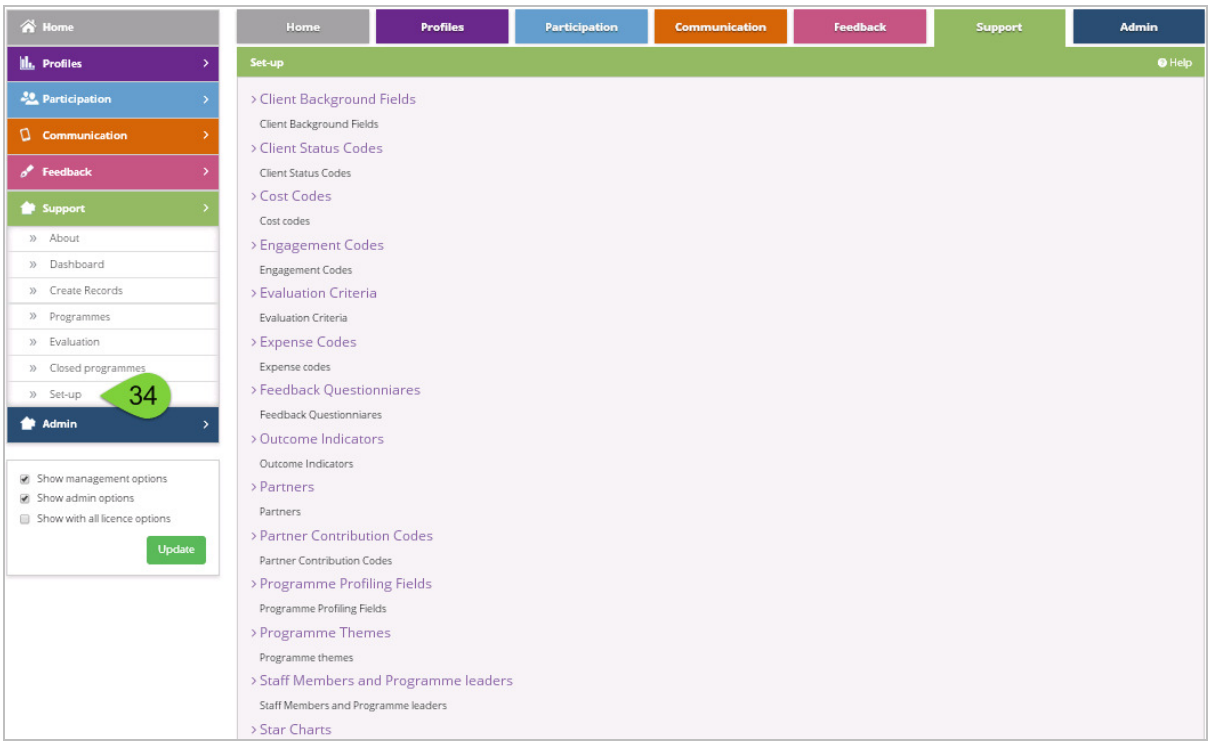
All closed programmes are listed on the ‘Closed programmes’ tab (32); click ‘View summary’ (33) to see an overview of the closed programme:



Open the ‘Programme evaluation’ section to see the scores, comments, date and evaluator.

Open the ‘Engagements’ section to view details of all the engagements relating to this programme: you can toggle between showing these arranged by client or arranged by engagement code.

6.9. Set up



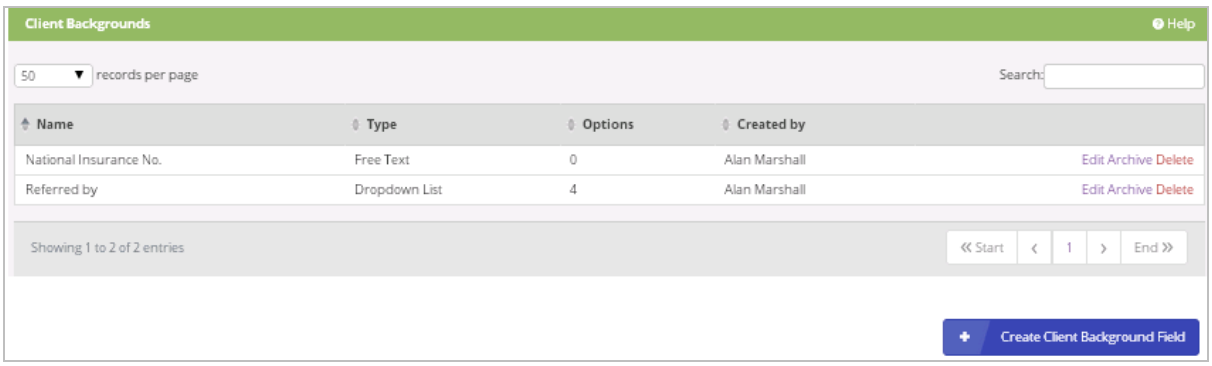
The setup options here affect both the 'Support' module and the 'Support' tab within each personal record in the 'Profiles' module.

As a general rule, you can add new options to any field at any time; you can amend the wording of existing options; but you cannot delete options once they have been used.

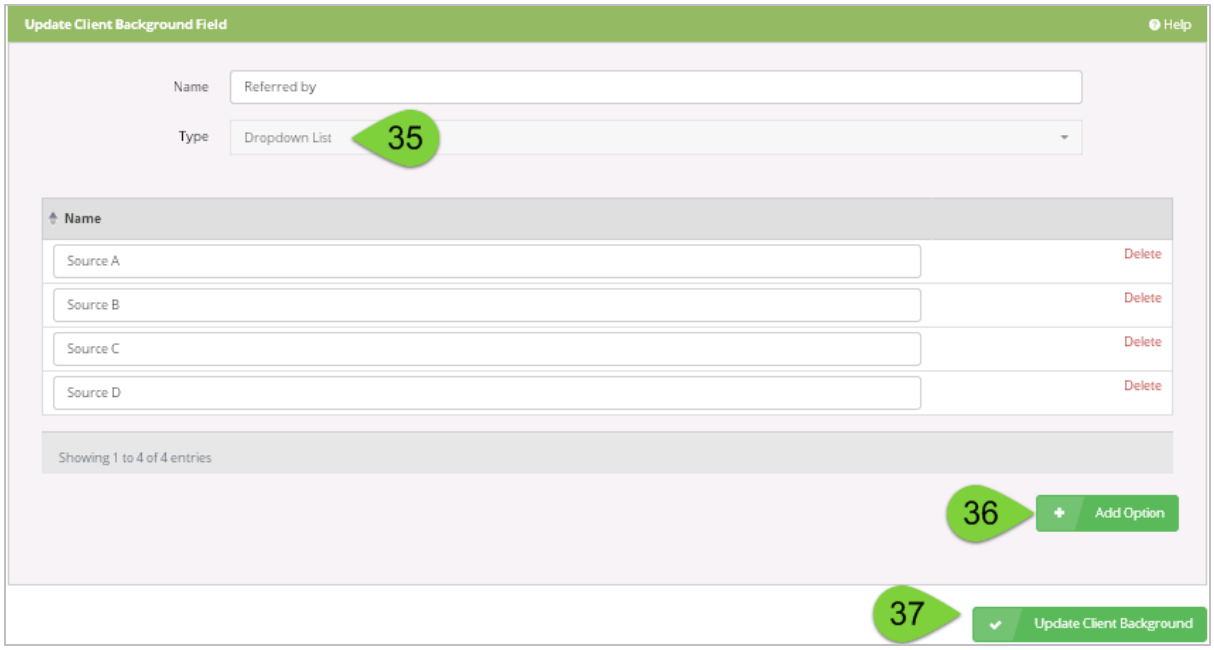
Archiving an option means that the option and the records relating to it still exist, but the option will no longer appear in dropdown lists.

Go to 'Support>Set-up' (34):

CLIENT BACKGROUND FIELDS



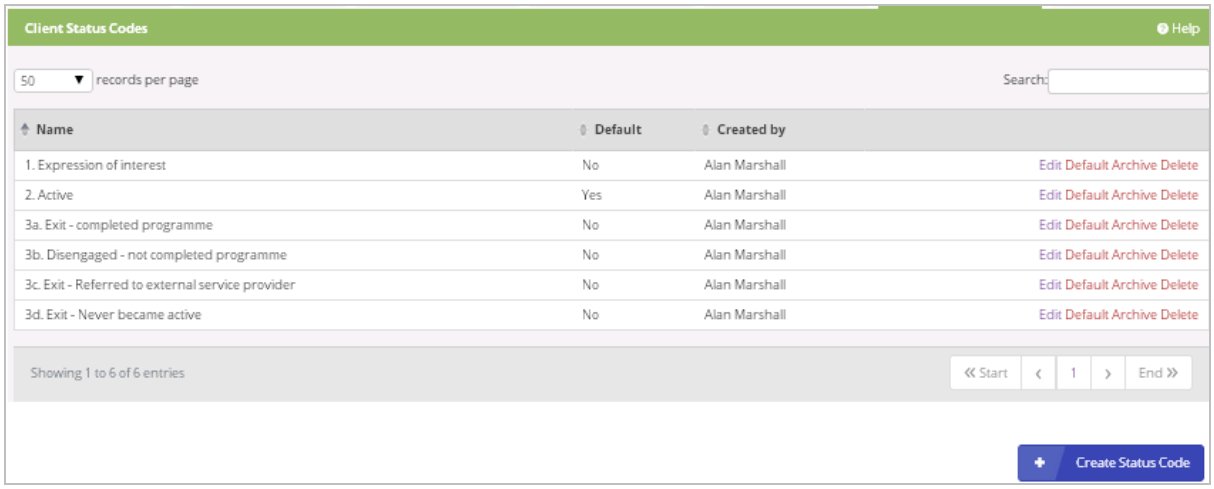
Click the ‘Create client background field’ button to add a new field:



Give your field a name and then select the type of field you require (35): Text field; Date field; Dropdown list; or Tick boxes. If the type you have selected requires a list of options, click the ‘Add option’ button (36) and give your option a name then repeat for as many options as you need.

When you have completed everything click the ‘Update client background’ button (37) to save.

CLIENT STATUS CODES



Hint: Start the name of each code with a number so that Tracker sorts them into a logical sequence matching a potential intervention journey rather than in alphabetical order.

One of these codes can be defined as the 'Default code' which means this will be the default setting when linking a new person to a programme (you can always amend it).

COST CODES

These relate to overall costs for a programme, not expenses claimed by client. The 'Code' (above) is what will appear in dropdown lists on screen; the 'Name' is to give you an opportunity to explain in more detail what the code is for.

ENGAGEMENT CODES

You can create as many codes as you like but remember that, with too many, users will have a long dropdown list to search through and any analysis or reporting will be broken down in lots of small data sets rather than a few key groupings: the choice is yours.

EVALUATION CRITERIA

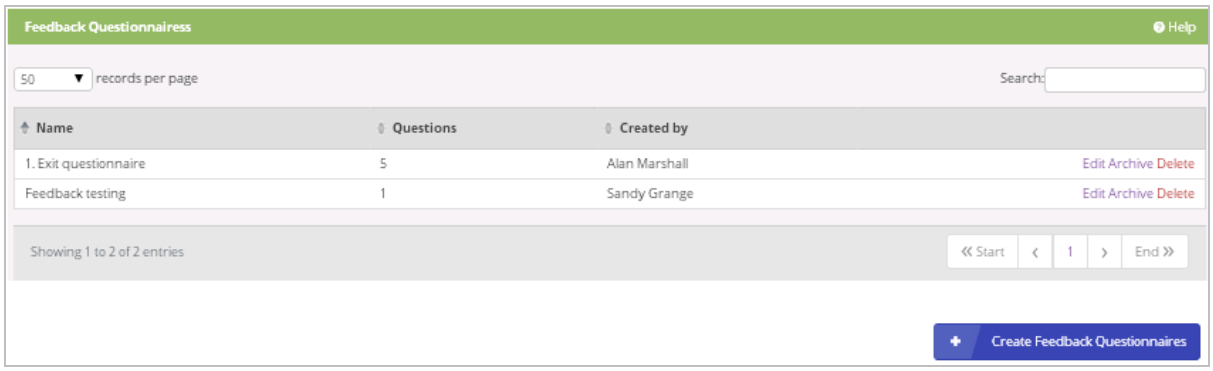
This is a facility to add one additional question to the standard set of five questions used to evaluate a completed programme.

EXPENSE CODES

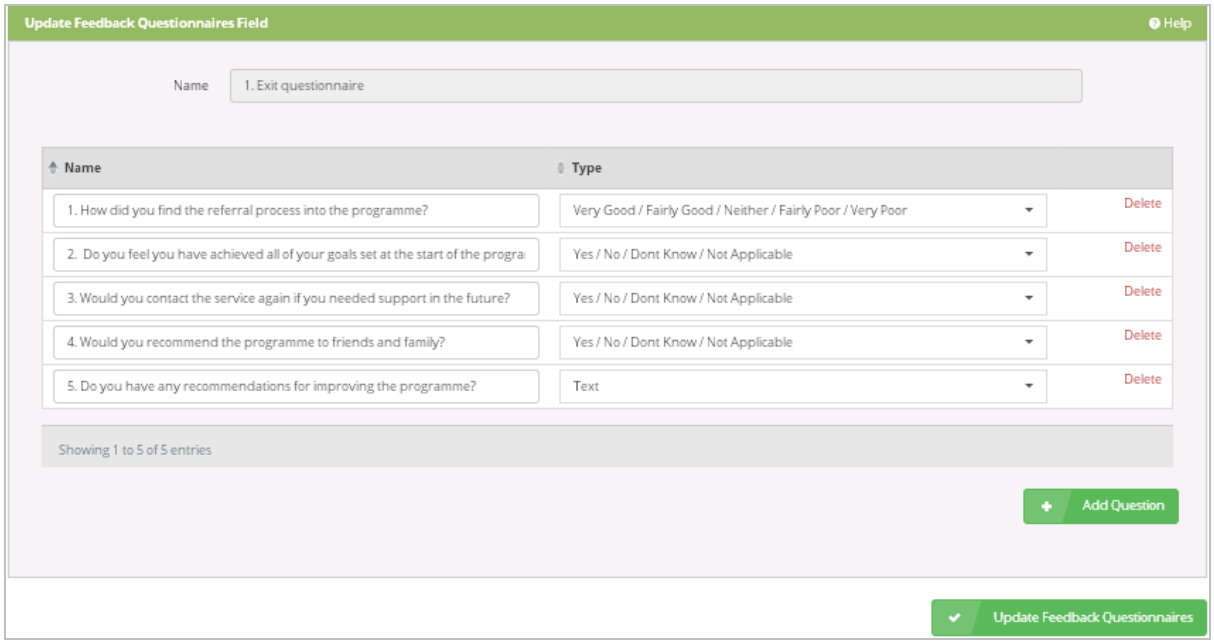
These codes relate to expenses claimed by clients, not costs relating to the overall programme which you are called 'Cost codes' in Tracker.

FEEDBACK QUESTIONNAIRES

Set up as many different questionnaires as you require and the questions relating to each of them:

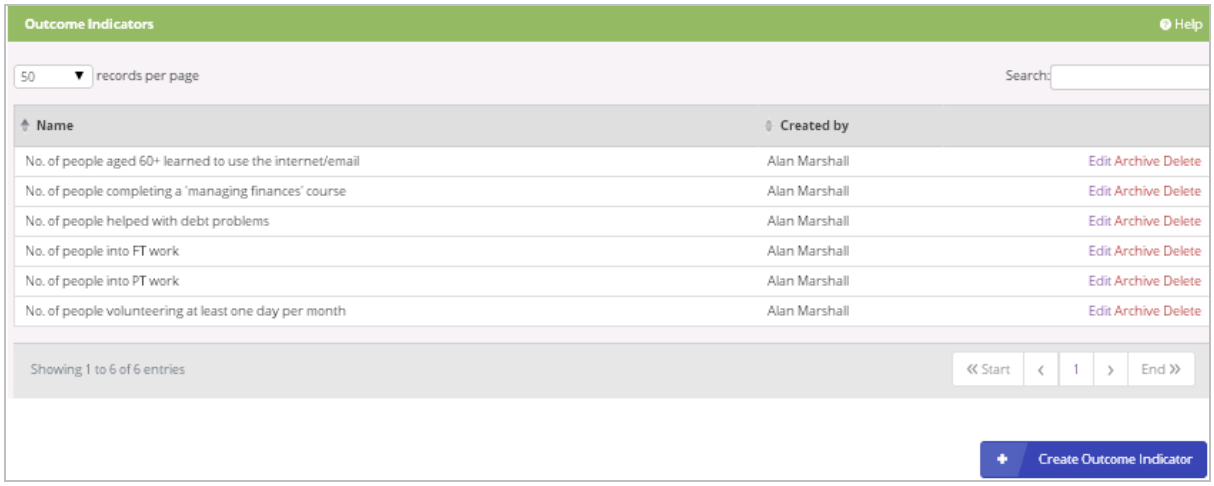


Click the 'Create feedback questionnaire' button to add a new questionnaire to the list; click 'Edit' to add or amend the questions relating to a questionnaire.


Update Feedback Questionnaires Field
Help
Name
1. Exit questionnaire
Name
Type
1. How did you find the referral process into the programme?
Very Good / Fairly Good / Neither / Fairly Poor / Very Poor
Delete
2. Do you feel you have achieved all of your goals set at the start of the progra
Yes / No / Dont Know / Not Applicable
Delete
3. Would you contact the service again if you needed support in the future?
Yes / No / Dont Know / Not Applicable
Delete
4. Would you recommend the programme to friends and family?
Yes / No / Dont Know / Not Applicable
Delete
5. Do you have any recommendations for improving the programme?
Text
Delete
Showing 1 to 5 of 5 entries
Add Question
Update Feedback Questionnaires

For each question you can select a response option set from the dropdown list available. (If you would like other options adding, call the Help Desk to discuss you needs).

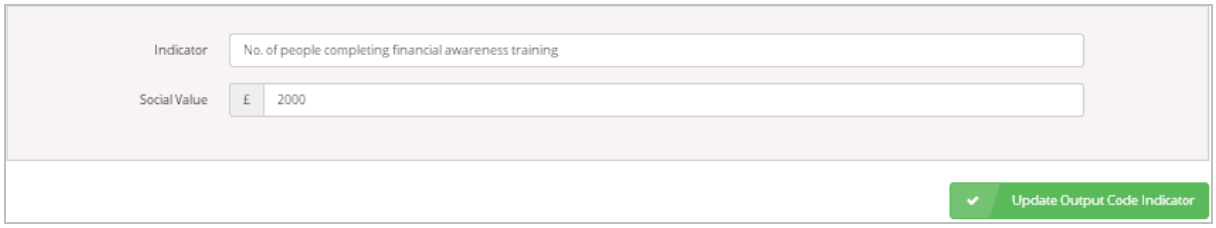
OUTCOME INDICATORS



When you create an indicator, it must be linked to one or more themes:

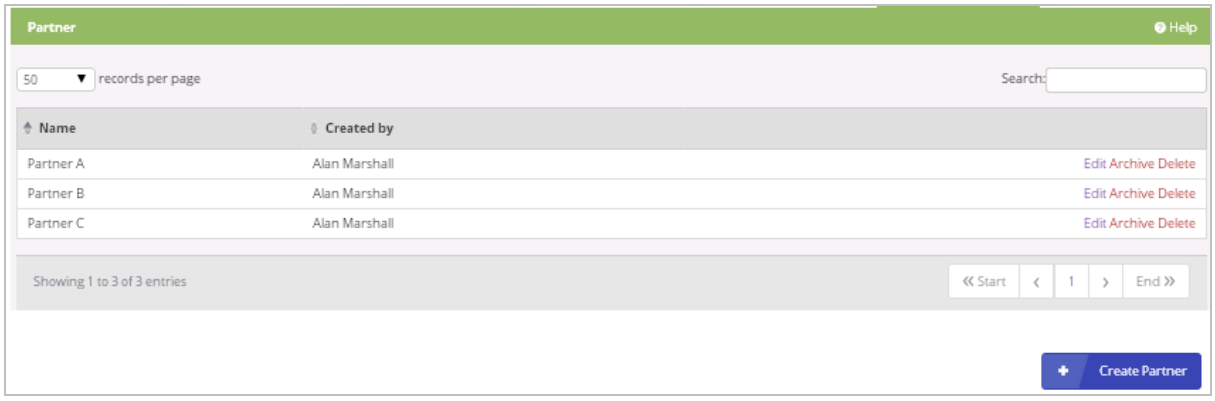
Link the indicator to multiple themes by ticking multiple options in the dropdown list. When users select indicators to record outcomes from a programme, the only indicators they can select are those linked to the same theme as that to which the programme is linked. This ensures consistency in outcome measurement and makes the dropdown list more manageable.

SV Each indicator can be linked to a social value proxy: this enables Tracker to calculate for you the overall social benefit created by a programme and to report this as a value but also as a return against the overall value of the inputs to the programme:



[This feature is not yet live]

PARTNERS



You can create a list of all the partner organisations with whom you may be collaborating on one or more programmes.

Click 'Edit' to amend the name of a partner or to set an hourly rate for valuing any staff time they may contribute **[Not yet live]**.

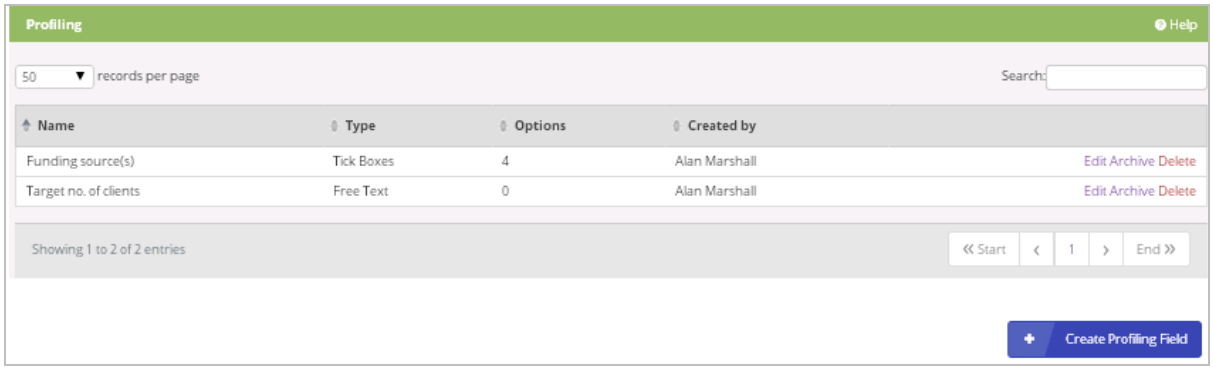
PARTNER CONTRIBUTION CODES

You can create codes for categorising the different types of contribution partners may offer.

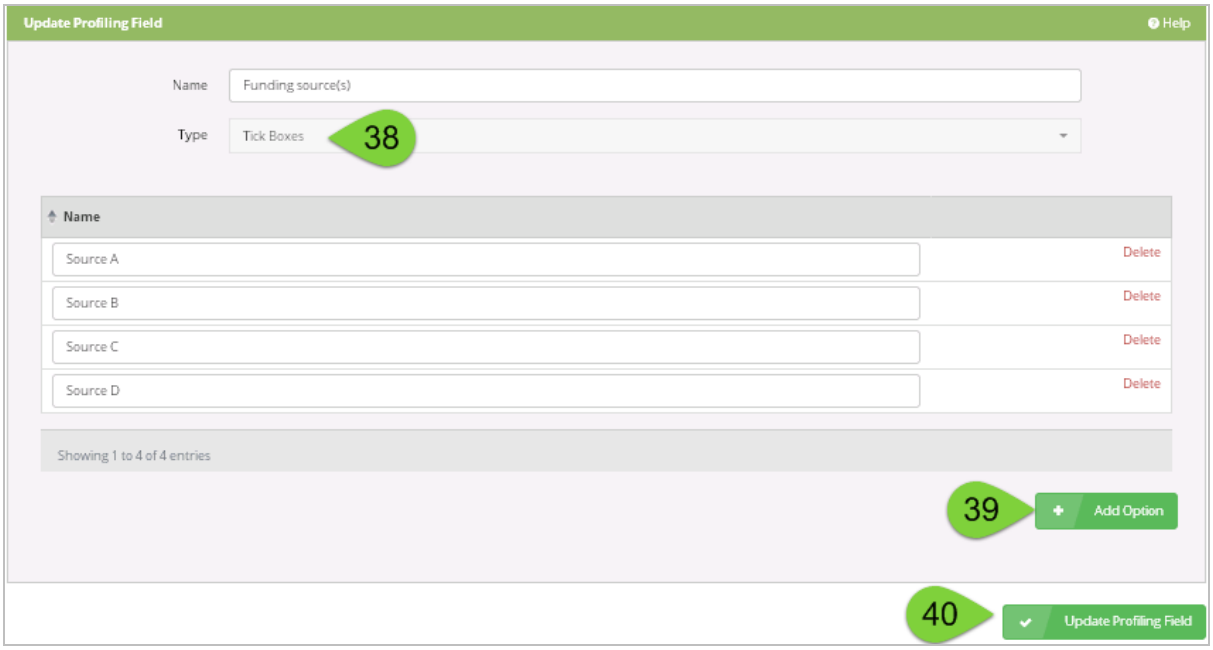
'Staff time' is a default code programmed into Tracker as it will link 'Hours' entered in a record with the hourly rate for that partner (above) to calculate the value of their contribution.

Any other codes you create will link only to the 'Value' you enter in a record.

PROGRAMME PROFILING FIELDS



Click the 'Create profiling field' button to add a new field:



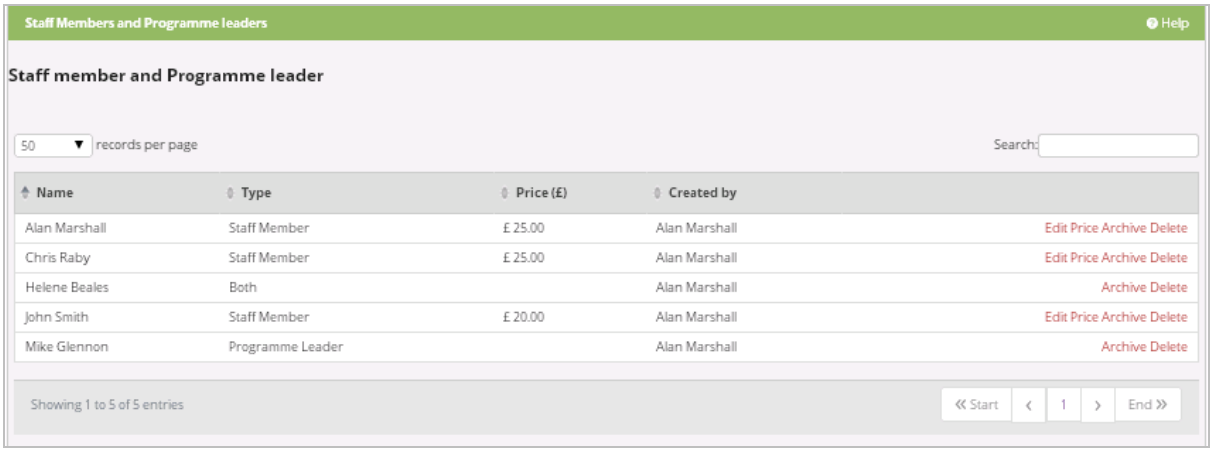
Give your field a name and then select the type of field you require (38): Text field; Date field; Dropdown list; or Tick boxes. If the type you have selected requires a list of options, click the 'Add option' button (39) and give your option a name then repeat for as many options as you need.

When you have completed everything click the 'Update profiling field' button (40) to save.

PROGRAMME THEMES

These are the broad categories to which programmes are linked to help with filtering and reporting.

STAFF MEMBERS AND PROGRAMME LEADERS


Staff Members and Programme leaders
Help
Staff member and Programme leader
50 records per page
Search:
Name
Type
Price (£)
Created by
Alan Marshall Staff Member £ 25.00 Alan Marshall Edit Price Archive Delete
Chris Raby Staff Member £ 25.00 Alan Marshall Edit Price Archive Delete
Helene Beales Both Alan Marshall Archive Delete
John Smith Staff Member £ 20.00 Alan Marshall Edit Price Archive Delete
Mike Glennon Programme Leader Alan Marshall Archive Delete
Showing 1 to 5 of 5 entries
Start
1
End

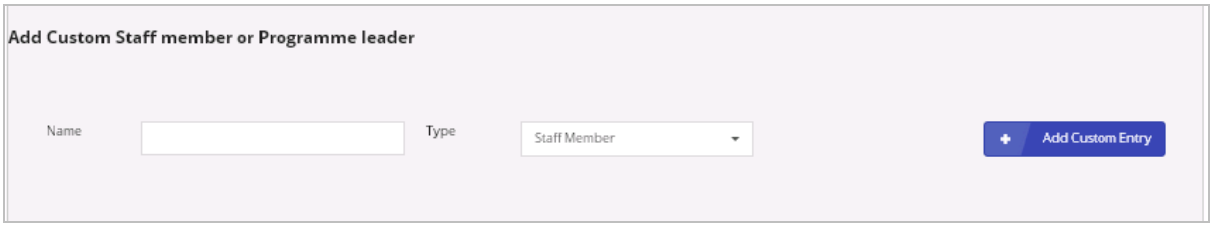
This is the list which will populate 'Staff member' dropdown lists and 'Programme leader' dropdown lists.

You can specify whether a name is to appear in one or other of the dropdown lists or in both.

You can specify an hourly rate for each name which Tracker will then use to translate their 'Hours' into an input value for the relevant programme.

You will have a shortcut to adding anyone who is a registered Tracker user by using the list at the foot of the screen and clicking 'Add'.

In addition, you can add people who are not registered Tracker users:



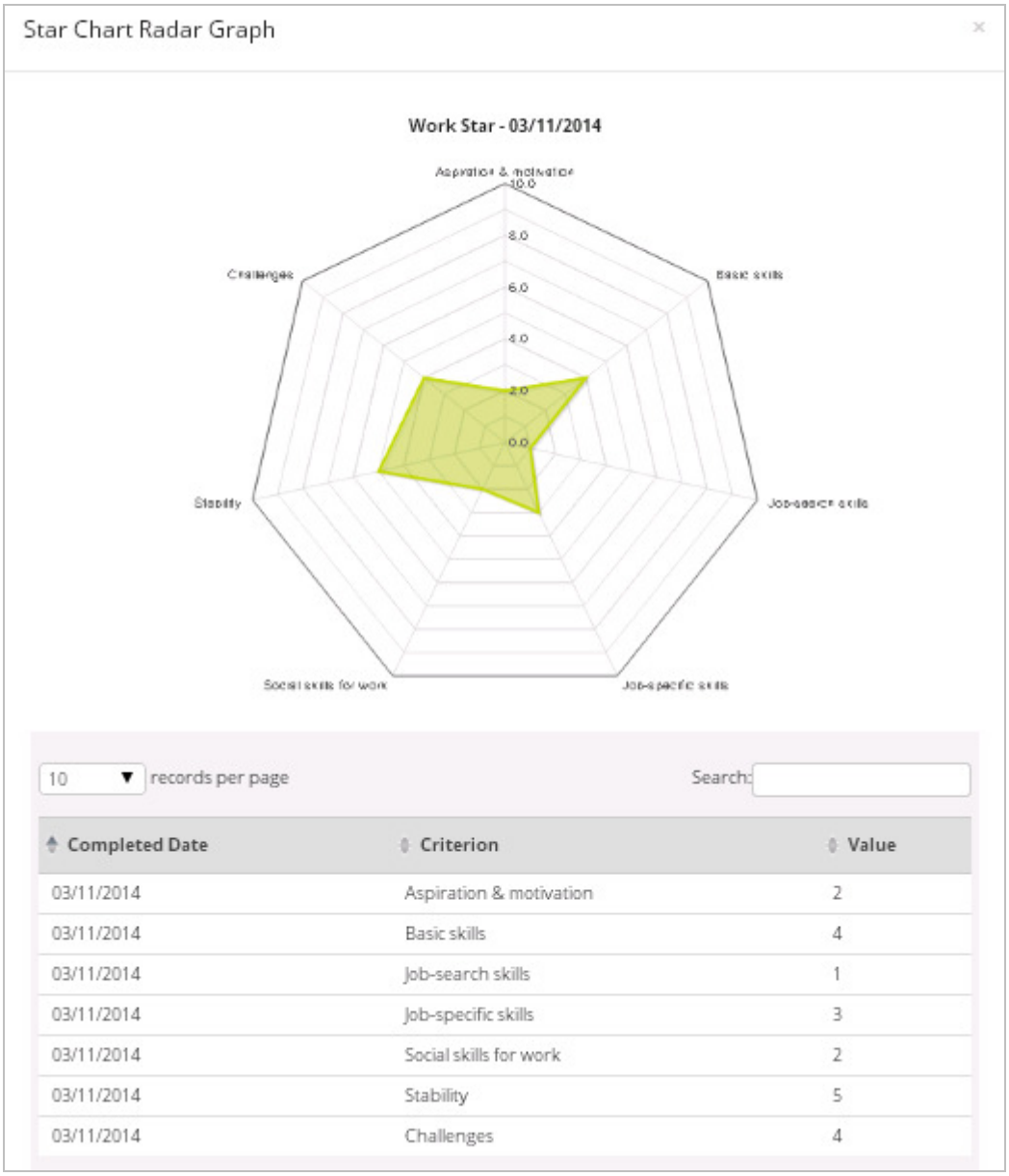
STAR CHARTS

Set up as many different star charts as you require and the criteria relating to each of them:

Click the 'Create star chart' button to add a new star chart to the list; click 'Edit' to add or amend the criteria relating to a star chart.

You can have up to eight criteria per star chart; if you require fewer than eight, just leave some blank.

Note that the description you give to each of the criteria will be what appears on the Star Chart: long descriptions may not format well on the actual chart:



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